Simplify Agent Management
Agents are the sales engines of insurance, financial services and telecommunication companies, yet managing this important business relationship is still an inefficient process. The SAP® Agent Performance Management® solution enables you to onboard and manage agents; helps ensure agents are in compliance with regulatory licensing; and manages books of business. Plus, you get a 360-degree, realtime view of all critical agent data through a comprehensive, flexible, and extensible platform that is available 24x7.

Agent information is typically spread across multiple systems, making it difficult to maintain trusted data across the organization. Legacy systems limit flexibility and don’t integrate well, resulting in disparate data sources that increase operating costs. Worse, they risk introducing inaccurate data that negatively affects the business.

By consolidating all agent data into a highly configurable cloud-based solution, SAP Agent Performance Management lets you deploy quickly, connect easily with other systems, automate and streamline agent administration, and eliminate the need for maintaining multiple silos of information. SAP Agent Performance Management draws on our industry expertise, our strong relationships with carriers, and our proven and trusted infrastructure to help you simplify agent performance management. (See Figure 1.)

Key Features for Simplifying the Agent Lifecycle

SAP Agent Performance Management supports the following features:

- Comprehensive agent management
- Integration with applications, systems, and credentialing registries
- Versatile reporting
- Flexible configurability

Additional functionality includes support for integrated workflows; license and appointments; books of business; and generation of e-mail and hardcopy correspondence.
**Simplifying the agent lifecycle and improve agent performance with SAP Agent Performance Management.**

SAP Agent Performance Management lets you manage an agent’s many roles, relationships, and hierarchies using a single identifier. It lets you include complete compliance profiles, which are updated in batch or real time. It also manages and tracks books of business efficiently.

**Enabling Robust Integration**

The solution integrates business processes with credentialing registries, including the National Insurance Producer Registry (NIPR), Financial Industry Regulatory Authority (FINRA), and the Depository Trust & Clearing Corporation (DTCC). It integrates with other systems through Web or batch services and integrated extraction, transformation, and load (ETL) tools. It also enables integration with SAP and third-party learning systems for continuing education needs.

**Offering Fast, Accurate Reporting**

The solution provides preconfigured reports to help business users access information quickly. It also enables on-screen audit views and audit reporting. Additionally, your business users can define their own reports and performance metrics.

**Flexibility with Configurability**

Add or change screens, fields, field labels, workflows, security, defaulting logic and more – all without coding.

**More Easily Manage Complex Agent Relationships**

Managing agent compliance profiles, demographics, hierarchical relationships, and changing roles over the duration of the business relationship is a difficult undertaking. With SAP Agent Performance Management, a single agent master record gives you a consolidated view of the multiple roles and relationships an individual may have with your organization. (See Figure 2.)

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**Key Benefits of SAP Agent Performance Management**

The solution offers a range of benefits for managers, agents, and business users. Specifically, it allows you to:

- **Quickly deploy** using a fully configurable cloud-based solution, purpose-built for the insurance industry
- **Improve efficiency** by automating manual processes, reducing paper, and consolidating multiple agent records onto a single platform
- **Support agents and business users on the go** with a solution that is available 24x7 and securely accessible from a desktop, tablet, or smartphone
- **Minimize the load on IT** by using advanced configuration tools designed for business users in a secure, high-performance environment
- **Gain visibility** with data updated in real time; comprehensive audit trails; preconfigured reports; and the ability to trace every action
- **Simplify integration** with existing systems through a full complement of Web services, based on representational state transfer (REST) protocols, and batch integration utilities
- **Extend the solution as needed** without coding, or by helping facilitate seamless integration with other SAP solutions, including solutions for onboarding, commissions, learning, and more
Each record contains hierarchical relationships and full compliance profiles – including errors and omissions (E&O) license checks, appointments, background checks, contracts, and more. Through a graphical user interface, business users can extend the data set to suit their unique business needs, including defining new screens and fields. SAP Agent Performance Management also manages and tracks books of business and supports a wide range of mass change functions, automating repetitive tasks and improving business efficiency.

**Enable Secure Integration with Internal and External Systems**
Different business units often need access to agent data, resulting in multiple data silos that risk introducing data synchronization errors. SAP Agent Performance Management consolidates all your agent data into one extensible platform that connects to your legacy systems or other software-as-a-service (SaaS) offerings. REST-based Web services and enterprise-grade ETL tools simplify both real-time and batch integration, helping ensure all data is accessible across the enterprise and eliminating the need for redundant databases of agent information. You can extend SAP Agent Performance Management to work with other solutions from SAP, including the SAP Commissions solution, and solutions for onboarding, learning, and more.

**Maintain Compliance with the Ever-Changing Regulatory Environment**
SAP Agent Performance Management supports preconfigured integrations with NIPR, DTCC, FINRA, and other registries. The “turnkey” nature of the integrations helps ensure that agents have valid credentials and your data is synchronized in real time with regulators.

With an integrated toolset that supports compliance tracking, and monitoring of licenses and appointments and education or certification records, SAP Agent Performance Management helps cut the time and effort needed to keep agents compliant. Tracking your business compliance is easier with detailed audit logs that capture changes made to every screen. Regular software updates keep your business up-to-date with any regulatory changes.

**Streamline Agent Communications**
While it’s good to understand agents relationships in depth, it’s even better to develop them into valuable affiliations that improve efficiency and enhance your brand with agents. With SAP Agent Performance Management, you can proactively communicate important information that could impact an agent’s productions and earnings. Using workflow logic, you can set alerts that automatically notify agents of continuing education or licensing requirements, and provide links to appropriate training or certification agencies. Branded correspondence templates let you generate personalized batch or on-demand communications quickly, delivered by e-mail or printed for mailing – so your agents can stay productive and keep selling. (See Figure 3.)

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**Figure 3: Comprehensive Solution**
**Extend Your Solution**

As part of the SAP Sales Cloud portfolio, SAP Agent Performance Management helps facilitate seamless integration with other SAP solutions. You can extend functionality as you need it, using REST-based web services and batch integration utilities. Additional capabilities and solutions include:

- **Onboarding** – Improve efficiency, eliminate paper, and automate contract renewals and terminations
- **SAP Commissions** – Pay agents accurately and efficiently
- **Learning** – Equip agents with the information they need to sell your products effectively
- **Sales enablement** – Enable sales with the right training, coaching, and content to help them win every time
- **Sales performance management** – Increase overall agent performance by identifying the successful selling behaviors of top performers – and use these insights to coach the rest of the team

**Start Generating Value Sooner**

Many agent solutions require complex coding to meet unique requirements or to integrate with other solutions. But while developers are writing and testing code, their solution is not generating value for their organization. In contrast, SAP Agent Performance Management is designed for business users. Our preconfigured reports for planning and compliance give you immediate visibility into agents, with no extra configuration required. And without requiring knowledge of coding, your business users can use an intuitive, user-friendly interface to get the information they need. They can add, move, or change fields; design and generate reports; customize screens; change hierarchies; and more. Since configurability does not impact performance, software upgrades, or new feature introductions, you can enjoy the newest innovations and still have predictable performance. (See Figure 4.)

**Partner with a Trusted Cloud Provider**

SAP is a leader in cloud-based sales, marketing, and learning solutions. Organizations around the world trust SAP to optimize their lead-to-cash process, to help them close more deals for more money in record time. With 24x7 system support and commitment to service level agreements, SAP offers the high availability that performance insurers need to do business. And with in-depth security – from user identity and authentication to encrypted data streams and storage – you can be confident your data is secure and accessible by only validated users.

![Figure 4: SAP® Agent Performance Management®](http://www.sapsalescloud.com/)

**Learn More**

For more information, visit [http://www.sapsalescloud.com/](http://www.sapsalescloud.com/).
SAP Sales Cloud

ABOUT SAP SALES CLOUD
SAP® Sales Cloud solutions are part of the SAP Customer Experience portfolio. SAP Sales Cloud allows you to sell more and create a lasting connection with your customers with AI-powered solutions that transform your lead-to-cash processes.

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