



**YOUR IN FORCE DATA & DIGITAL
ENGAGEMENT PARTNER**

**DISTRIBUTOR RESOURCE CENTER
Content Overview & Checklist**

www.nicdistributorlearning.com

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The **Distributor Resource Center** is available to all NIC BGA customers and provides information and instruction so that you can maximize the potential of the NIC Platform.

The Resource Center is organized into 6 Sections;

- 1) Managing Your In Force Book
- 2) In Force Policy Services for BGAs
- 3) In Force Policy Services for Your Agents
- 4) Manage Your Partner Network
- 5) Digital Engagement with Your Agents
- 6) Application Admin & General Use

Each section is comprised of multiple modules and each module is tied to a specific business or use cases. Each business or use case is designed to save you time and create efficiencies, save you money or assist you to monetize your in force book.

To access the Distributor Resource Center visit www.nicdistributorlearning.com

NIC has created training plans for your BGA departments including:

- 1) Management
- 2) Sales & Business Development
- 3) Agent Service & Support

To access Training Plans visit www.nicdistributorlearning.com/bga-training

MANAGE YOUR IN FORCE BOOK Actively manage and optimize your in force book		
TOPIC	DETAILS	COMPLETED
Explore Your Life Book	Explore and manage your in force life book.	
Explore Your Annuity Book	Explore and manage your in force annuity book	
Policy Segmentation & Lists	Create lists of policies for easy management and sharing	
Policy Owner Profiles	Instant access to customer contact information, in force life policies, in force annuity contracts and documents	
Policy Event Management	Set 'date based' reminders on policies and lists of policies	
Policy Watch	Set thresholds on multiple policy attributes and be alerted when policy information changes	
Lapse Pending Policies	Identify policies at risk of lapsing and share those policies with your Agents	
Product Changes	Identify Agents and Policy Owners impacted by product changes & communicate those changes	
Industry Changes	Identify Agents and Policy Owners impacted by industry changes & communicate those changes	
Policy Anniversaries	Set reminders for upcoming policy anniversaries	
Missing Living Benefit Rider	Identify policies with missing living benefit riders.	
Under Insured Clients	Identify under-insured clients, segment them into a list and share those lists with your Agents	

MANAGE YOUR IN FORCE BOOK Actively manage and optimize your in force book		
TOPIC	DETAILS	COMPLETED
Cost of Insurance Increase	Identify and manage policies impacted by Cost of Insurance increases and notify your Agents	
Data Extracts	Extract your policies, clients and network data into a .csv	

SECTION 2: IN FORCE POLICY SERVICES FOR BGAS

IN FORCE POLICY SERVICES FOR BGAs Identify Sales & Service Opportunities from your in force book		
TOPICS	DETAILS	COMPLETED
Mining Your In Force Book for Sales Opportunities	Mine your in force book for sales & service opportunities	
Term Renewal Opportunities for BGAs	Mine your in force book of term renewal opportunities	
Term Conversion Opportunities for BGAs	Identify policies that qualify for term conversions	
Life Settlement Opportunities for BGAs	Identify policies that are prospect for life settlements	
Policies with Insufficient Long Term Care Coverage	Identify policies with no long term care coverage	
Paid to Date Trigger for BGAs	Identify policies at the end of their level term period	
Term Conversion Expiry Date	Identify and manage policies within specific conversion expiry date notifications	

SECTION 3: IN FORCE POLICY SERVICES FOR YOUR AGENTS

IN FORCE POLICY SERVICES FOR YOUR AGENTS Identify Sales & Service Opportunities from your Agents in force book		
TOPICS	DETAILS	COMPLETED
Mining your Agents In Force Book for Sales Opportunities	Mine your Agents in force book for sales & service opportunities	
Term Renewal Opportunities for your Agents	Mine your Agents in force book of term renewal opportunities	
Term Conversion Opportunities for your Agents	Identify your Agents policies that qualify for term conversions	
Life Settlement Opportunities for your Agents	Identify your Agents policies that are prospect for life settlements	
Term Conversion Expiry Date	Identify Agents and manage policies within specific conversion expiry date notifications	
Declining Cash Value Opportunities for your Agents	Identify policies with declining cash values within your Agents book	
Long Term Care Rider Opportunities for your Agents	Identify policies with no long term care riders within your Agents book	
Paid to Date Triggers for your Agents	Identify policies at the end of their level term period within your Agents book	

SECTION 4: MANAGE YOUR PARTNER NETWORK

MANAGE YOUR PARTNER NETWORK Organize and optimize your Partner and Agent network		
TOPICS	DETAILS	COMPLETED
Navigate Your Partner Network	Navigate through your hierarchy and all of the various business units in the downline including Sales Managers, firms, offices and Agents	
Explore Your Partner Network	Explore your partner network and their in force book of business as well as business insights including sales and service opportunities	
Sales Trends & Reporting	Access sales & production statistics for all downline firms and Agents	
Agent Profiles & Access	• Explore Agent information including their in force book • Enable Agents with access to their in force book	
Agent Segmentation & Lists	Segment your Agent network based on performance or other attributes	
Dormant Agents	Identify dormant Agents and explore their in force book	
Firm and Office Profiles & Access	• Explore firm information including their in force book • Enable your partners with access to the firms in force book	
Firm Segmentation & Lists	Segment your partner firms based on performance or other attributes	
Sales Manager Profiles & Access	• Explore Sales Manager information including downline firms & Agents and their in force book • Enable your Sales Managers with access to their in force book	
Direct Messaging	Secure, direct instant messaging with your Agents on NIC	
Broadcast Messaging	Secure, direct instant messaging to lists of Agents on NIC	
Document Sharing	Secure document sharing with Agents	
Marketing to Agents	Market your services and events to your Agents	

SECTION 4: MANAGE YOUR PARTNER NETWORK

MANAGE YOUR PARTNER NETWORK

Organize and optimize your Partner and Agent network

TOPICS	DETAILS	COMPLETED
Book of Business Acquisition	Access Agent book of business information to assist with book of business valuations	

SECTION 5: DIGITAL ENGAGEMENT WITH YOUR AGENTS

DIGITAL ENGAGEMENT WITH YOUR AGENTS Drive adoption and usage of your online and digital services		
TOPICS	DETAILS	COMPLETED
Empower Agents with Access to NIC	Empower your Agents with access to their in force book	
Sharing Sales & Service Opportunities with an Individual Agent	Mine an individual Agent's book and share sales and opportunities with your Agent	
Sharing Sales Opportunities with Groups of Agents	Mine your entire book and share sales and opportunities with multiple Agents	
Sharing Product Changes with Agents	Targeted, relevant online communications to Agents to provide product updates and other information	
Sharing Industry Changes with Agents	Targeted, relevant online communications to Agents to provide industry updates and other information	
Sharing Documents with Agents	Secure solution for sharing documents with an individual Agent	
Direct Message with Agents	Online direct messaging with individual Agents	
Broadcast Messages to Groups of Agents	Targeted, direct messaging to multiple Agents	
Group Chat with Agents	Group chat channel for multiple Agents to share ideas	
Advertising to Agents	Promote your products, services and upcoming events on NIC	
Agent Resources on NIC	Drive adoption and usage of your digital services	
Distributor Website - Agent Access	Enable your Agents with easy access to NIC through your website	

APP ADMIN & GENERAL USE		
TOPIC	DETAILS	COMPLETED
General Navigation	Explore the NIC Distributor App.	
Search	Locate Policy Owners, policies, Agents and partner firms in seconds	
User Settings	Set up your user profile	
Hierarchy Management	Set up and manage your downline hierarchy	
Inviting Agents (Individual & List)	Invite individual or a list of Agents to NIC	
Sales Manager Management	Provide Sales Managers with access to NIC	
Support Staff Management	Provide Support Staff with access to NIC	