

What critical workflow technology improvement would you like carriers to address?

***MARKETING RELATED**

Automated welcome kits to clients

Would love to see carriers work more with state associations for product training and implementation of technology initiatives.

We need to take some heavy lifting off agency though especially given the # of people leaving with great retirement and lack of talent in pool with experience. For larger agents automation is key.

Meeting clients where they are. Not easy with multiple vendors. Vendors recognizing that to mesh data into fewer dashboards.

***MISC**

Billing/
Late-Pay automations

More e-signature features

***DOWNLOAD, eDocs**

Will we get to the point of real-time download?

All companies need to download all lines of business.

One issue cited was a lack of standardization among carriers. Some use IVANS, others don't.

eDocs and Messages - need it to be adopted by more carriers.

Better integration between carrier sites and agency management systems to help with submissions, policy changes, claims, etc.

Carriers need to fix their downloads when they overwrite the data in our management system

eDocs - but by policy line (PL vs CL)

I am interested in eDoc's and Claims Download improvements and implementation

Carriers need to "speak" better with AMSs through IVANS, but need to have agencies involved to provide input on what's working/not. This is missing.

Is there a Standards group for carriers to join in an effort to help integrate more consistently across management system platforms? (AUGIE?)

All potential downloads need to be implemented from all carriers i.e. policy, claims, edocs, direct bill

Better info on what download does/doesn't do. Also more eDoc options. Would love better abilities to manage these options from carrier websites for efficiency of time when making adjustments.

***Rating, Submissions**

Investments in a direct feed from benefits portals for the EB side

How can carriers better collaborate and assist with consolidation/integration due to acquisition or carrier consolidation?

consistent coverage codes between carriers

The ability to send submissions electronically from our tech instead of going to individual carrier websites.

***SECURITY**

Single sign-on and ease of getting employees provisioned & de-provisioned

Sign On Once / ID Federation - Not seeing unified MFA and other security from carriers/industry.