Convey Services

The Case for Portals

Inform, Educate & Engage Producers

eBook

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Overview

Your organization relies on independent agencies and producers as a key component of your revenue strategy. Agencies and producers are secured through relationships developed with aggregators, at events, during trade shows and in other personal interactions. Technology should also be a critical strategy to reinforce your message and nurture those relationships long after the event or trade show is behind you. Portal technology empowers producers to understand your value proposition, your products, the type of customer that are most ideal, and how to sell insurance products effectively.

Why Every Carrier & Vendor Needs a Producer Portal

Automate Marketing

Marketing departments tend to be understaffed and underfunded compared to direct sales organization. A producer portal allows the marketing team to automate how they manage and reach producers so they can do much more with less people and budget.

Nurture Relationships

In order to have access to your portal, individuals must tell you who they are before they are given a login. Once they are in your environment, you have the opportunity to track their movements, interact with them, answer questions, and direct producers to the training and information they need to appropriately represent you.

Help producers sell more effectively

You know the type of customers you want, the products that best meet their needs, who the right decision makers are, and the sales process that will translate a prospect into a customer. Producer portals give you the opportunity to provide on-going sales skills training to ensure that your producers execute the right strategy to win the deal.

Save Time & Increase Productivity

If producers have to search multiple online locations or dig through emails for information about you, that represents an enormous waste of time searching. Producer portals consolidate information in a single online location and make it accessible without the producers having to go multiple places to get what they need.

Create Calls to Action

It's not enough to just look at content, it's much more important that you motivate producers to take the next step in the process by translating what they've learned into action. Portals are designed to create calls to action as your producers fill out forms to communicate with you, sign up for webinars, or participate in discussion forums.

Automate marketing to do more with less staff and budget.

Nurture relationships through online interactions in the portal.

Help producers sell with online sales training & strategy.

Increase efficiency by presenting information in one online location.

Create calls to actions through forms, forums, training and registrations.

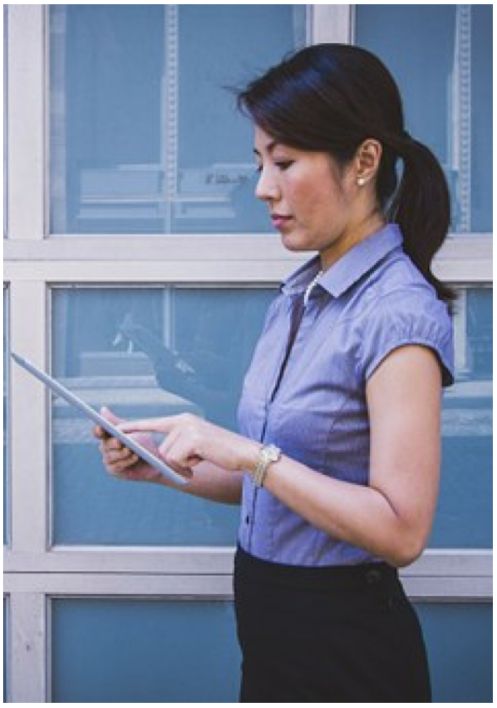
Help producers market by providing marketing materials and automated email campaigns.

Keep the company at the top of producer's mindshare through outreaches and alerts

Analyze producer needs by tracking what they interact with on the portal.

Keep Your Company Top of Mindshare

Producers have the option of either selling your products or those of your competitors. Producer portals can outreach to producers to remind them that you are out there, alert them when there is something new to pay attention to or engage them with your latest new business incentive to enhance their commission potential. Reinforcing your message is critical to keeping your producer engaged.



Analyze Producer Needs

Once a producer logs in to your portal, you now know that they've been there, how long they have stayed and what they are looking at. Based on portal analytics you now have the opportunity to adjust your content strategy, populate your portal with the most interesting information, or reach back out to the producer to offer help and support for the products they are researching.

The Case for the Convey Producer Portal

Convey offers a knowledge and engagement portal that organizes and presents content, offers training, and provides opportunities for producers to interact with you and with each other. Convey portals are much more than a knowledge center and function as a marketing outreach engine to engage and nurture producers and help them market to their customers and prospects.

Convey has been providing portals to the insurance industry since 2015 and understands the unique needs of master agencies, brokers, carriers & vendors. here are some capabilities and benefits that makes a Convey producer portal unique in the industry.

Convey portals can be networked together.

Convey builds its portals with hub and spoke capability so that a centralized hub site can update portals that are connected to the hub through a network. This networking capability allows extremely efficient content delivery, promotes portal and content standardization across the network, and analyzes all portal activity on the hub platform.

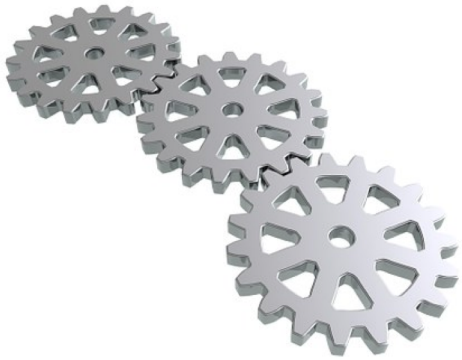
Convey Insurance
The Convey Insurance hub site is connected to master agency networks and aggregators updating thousands of agencies and producers.

Convey portals are designed to be delivered in days, not weeks or months

Convey analyzes a company's branding and messaging to create a custom look and feel for the portal home page. Portals come complete with a fully set up producer CRM, message library, member applications and dashboards, and standard reports. Convey consults to understand any special needs and customized the portal to meet your requirements.

Convey's portal pricing is economical and often well below other portal options.

Convey offers a simple pricing strategy that allows you to have as many administrative users or producers as you want for a single subscription price. Convey doesn't meter your content, allowing you to host as much information as you need in the portal.

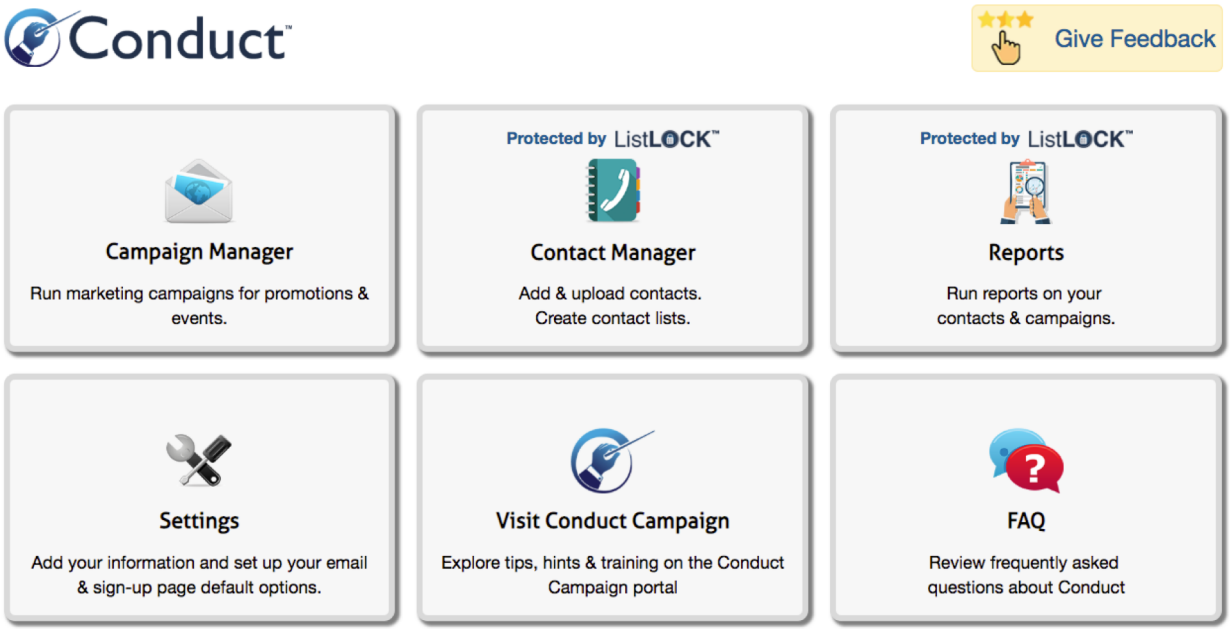


Convey portals connect with and integrate with other technology to offer the member a seamless user experience..

Convey portals are knowledge and marketing centers that use an API to connect to other producer portals that manage administrative activities such as quoting or order tracking. Members can login to an administrative portal then come into the Convey portal without having to logout and log back in. Convey's member database can automatically be updated by a primary portal.

Convey portals have Conduct™, a unique producer email marketing platform.

Producers no longer have to worry about creating and delivering custom email marketing campaigns. Create an email campaign on the producer portal, deliver it to the dashboard of your producers, and can review and schedule the emails, assign the contacts to receive them, and launch the campaign with 4 outbound emails and a sign-up page. Everything is branded with the producer's graphics and contact information. Producer lists are protected with Convey's proprietary ListLock™ technology.



Convey portals are organized into catalogs so many individuals or organizations can manage them and add content.

Catalogs function as mini websites and contain headers, banners, pages, and content. Different departments or external organization can manage a catalog adding graphical elements and content.

Convey portals keep content and graphics current.

Nothing discourages a producer more than coming to a portal to see expired promotions and outdated content. The Convey portal notifies catalog administrators that it is time to login and add new content on a regular basis. The scheduling engine allows banners or content to go live when it's time to present the information and be retired when the information is no longer current.

Convey portals are designed to outreach and engage producers.

Convey's message library comes standard with automated producer emails reminding them to login, if they have a file waiting in their dashboard or if there is something that requires their action. The message library is used to send custom emails, newsletters, invitations to webinars or a host of other producer outreaches.

Convey networks portals together for efficient content delivery, standardization and centralized reporting.

Portals come online quickly vs. the weeks or months it takes other portal solutions.

Convey portals are economical with simple pricing, unlimited users and content hosting.

Convey portals integrate with other technologies for a seamless user experience.

Conduct™ automates producer marketing with unique email campaign technology customized for the producer.

Portals have catalogs that function as mini websites and can be managed by an administrator.

Content & graphics stay current with automated reminders and a scheduling engine.

Convey portals outreach and engage producers with reminders, notifications, custom messages and newsletters.

Convey portals analyze all producer activity so you can make better decisions.

Convey analyzes everything, giving you insight into producer behavior and interests.

Convey's analytics engine looks at all producer activity and presents the information to you in standard reports or allows you to create your own custom report. Any email outreach from the Message Library or Conduct is analyzed to tell you the status of email delivery, the unique clicks and responses to the sign up-page.

Summary

Is it time for you to add a producer portal? If so, get in touch with Convey and we'll help you craft the right producer portal strategy for your marketing program.

Learn More About Convey Portals

Learn how businesses engage producers, customers, employees and member groups with a Convey Portal

Explore Convey's Portal Solutions
Schedule a portal demo today

Contact Convey to learn more:
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