

SALESINTEGRATOR™

ELEVATE YOUR AGENCY PERFORMANCE, WITH EASE



QUOTES & ILLUSTRATIONS



FILED UNDERWRITING



E-APPLICATION



AGENCY MANAGEMENT

- CASE MANAGEMENT
- COMMISSIONS
- CARRIER DATA FEEDS
- SALESINTEGRATOR



E-DELIVERY



DATA ANALYTICS & AI

Introducing **SalesIntegrator™**, our specifically designed CRM that seamlessly works with Agency Integrator. With SalesIntegrator, you provide your agency's sales team with the right balance of traditional CRM functionality – while eliminating frustrating complexities associated with your sales staff.

Since SalesIntegrator and Agency Integrator share the same database, you gain the confidence of ensuring that your data is flawlessly synchronized. This integrated data will power your sales team to access both pending and historic business records effortlessly, enabling them to stay informed about ongoing cases, share information such as vital illustration details, record essential notes, as well as schedule follow-ups while remaining up to date with agency trends.

It's time to say goodbye to data management headaches – and hello to streamlined productivity, with SalesIntegrator.

FEATURES



Ensures real-time data consistency through access to the same database as Agency Integrator



Easy access to both pending and historic data, providing a thorough understanding of your agency business portfolio



A simple and straightforward designed dashboard provides a hassle-free user experience



Illustrations are easy to manage and track, ensuring you stay on top of your sales process



Efficiently manage notes and track essential information, ensuring organization and accessibility



Supports your agency's reach and opportunities with your national account and Broker-Dealer relationships

BENEFITS



Enables you to make better executive decisions with robust reporting



Gain valuable insights into agency trends to enhance performance



Keeps your entire team, sales, and case managers, in alignment



Centralize and manage all your data in one unified system for streamlined efficiency



Provides the ability to see real-time, accurate case and agent information – as soon as it's provided by the case manager or carrier



Experience faster on-boarding and minimal downtime – to maximize efficiency



SCHEDULE A DEMO

www.ipipeline.com | sales@ipipeline.com | 800.758.0824

