

SAP Solution Brief | PUBLIC

Sales Performance Management | SAP SuccessFactors Agent Performance Management



Optimize Agent Management with Streamlined Processes



Managing Agents Effectively Across Their Lifecycle

Agents are your largest distribution channel, yet managing them can be a complex task. If they lack the tools to perform their job efficiently, agents may be tempted to move to a carrier that offers a better experience. To avoid this, you need an agent management solution that provides **clear paths** for onboarding, relationship management, performance metrics, and compensation.

The SAP® SuccessFactors® Agent Performance Management solution streamlines onboarding, compliance, and incentive compensation management to support your insurance company. It helps optimize outcomes and deliver superior performance by increasing seller motivation and promoting healthy sales competition. And it increases visibility into agent planning, performance, and payments.

You can connect diverse systems, letting you reduce information silos, support change management, and reduce costs. An integrated

system for handling multiple roles, products, and hierarchies boosts agility by helping you manage crediting, chargebacks, policy tracking, and premium details. And increased flexibility in designing commission and bonus plans enables you to develop more-strategic and competitive programs.

Meanwhile, you can give your agents a better experience with intuitive tools that help eliminate manual processes, reduce errors, and increase productivity.

**Managing Agents Effectively
Across Their Lifecycle**

Integrated Agent Management and a Single Source of Truth

By letting you efficiently integrate data across diverse systems, SAP SuccessFactors Agent Performance Management helps create a central hub for agent intelligence. You can quickly access accurate insights on agent demographics, licenses, appointments, training and certifications, background checks, contracts, and hierarchies. And you can better track agent sentiment, qualitative feedback, and intent signals.

The solution connects smoothly with credentialing registries such as the National

Insurance Producer Registry (NIPR) and the Financial Industry Regulatory Authority (FINRA), for greater visibility. Preconfigured integration with the Medicare model of the Centers for Medicare and Medicaid Services (CMS) lets health insurance companies intuitively modify standard rates and options for payments, enrollments, and proration. Using 25 retroactive adjustments across thousands of client-defined scenarios, you can create a self-correcting system that aids accuracy.

Integrated Agent Management and a Single Source of Truth

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Clear Compensation Management Paths

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Retroactive adjustments across thousands of client-defined scenarios help you increase accuracy without additional manual intervention.

By integrating producer management, the book of business, and payment rules, the solution enhances transactional data to support downstream reporting and your specific calculation logic. Once configured to your business rules, it enables comprehensive retroactivity with your audit trail to help ensure your payments are correct. If any of the

underlying data elements change, your business rule logic automates the system to adjust payments as needed.

And user-friendly hierarchy handling helps you manage incentive changes, line expansions, and acquisitions, increasing flexibility.

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By drawing together data from multiple systems, you increase transparency with one source of agent intelligence.

Automation to Accelerate Onboarding and Boost Productivity

By connecting customized, automated self-services with your agent management system, SAP SuccessFactors Agent Performance Management lets you onboard agents faster in a single continuous process.

Once on board, agents benefit from a user-friendly interface that allows them to consolidate their data from day one so that they can start selling immediately. Employee engagement

features help promote morale and further increase agent productivity.

Workflow automation not only smoothes onboarding but also helps agents manage appointment requests and other recurring tasks. And robust task management helps increase efficiency by enabling agents in the field to see what state-level appointments have been scheduled and what needs to get done.

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Help agents add value from day one with intuitive onboarding tools.

Clear Compensation Management Paths

Managing the compensation of internal and external agents is a complicated undertaking. SAP SuccessFactors Agent Performance Management simplifies the compensation management process by supporting extensive rules-driven hierarchies, compliance tracking and verification, and a robust book of business.

In addition to these capabilities, the solution helps you smoothly manage client-defined performance metrics, advances, earned as opposed to unearned commissions, and debt. It offers different options for payout types and tasks,

creating further efficiencies across compensation management.

Advanced incentive management processes allow you to design, distribute, and model agent compensation plans and programs for large numbers of payees. You can support multiple lines of business, numerous products, and plans for both captive and independent agents. And you can encourage the right behavior with splits, credits, tiered bonuses, accelerators, and multidimensional rates.

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Reduce complexity with streamlined compensation management for internal and external agents.

Automated Compliance

SAP SuccessFactors Agent Performance Management makes it easier for you to manage compliance across the agent lifecycle. For new agents, it provides embedded onboarding with built-in checks that help satisfy legal and regulatory requirements. Then, as these agents progress within the field, the solution facilitates a more-accurate view of their data. Process automation that reduces errors in transporting agent data from one system to another also fosters compliance.

Tight integration with entities such as NIPR, FINRA, and the Depository Trust and Clearing

Corporation (DTCC) lets you automate credential management. On the licensing side, you can send notifications for expiring licenses and renewal appointments. You can keep track of training by initiating education-certification checks and sending agents reminders to take courses. Meanwhile, just-in-time appointment features enable more-efficient and less-expensive compliance.

And for health insurance companies, you can remind agents to keep up to date with background checks and America's Health Insurance Plans (AHIP) certification.

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Lower the risk of audits and aid compliance across the agent lifecycle.

Smooth Management of the Book of Business

SAP SuccessFactors Agent Performance Management increases visibility into your book of business, helping you consolidate information on policies, performance, and the historical detail and ownership of customers.



Gain a 360-degree view of relationships between agents and clients, including comprehensive visibility of historical detail.

You can efficiently make mass changes to account details and quickly access client lists, contract details, and effective dates and expiration dates, as well as relevant contacts for each agent.

Whereas multiple touch points have historically been difficult to record, the solution lets you use your book of business to break down relationships between clients and the agents working with them. It provides a one-stop shop to enable you to view and manage these crucial relationships more easily.

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Robust Support for Multiple Roles and Relationships

With SAP SuccessFactors Agent Performance Management, you can maintain multiple concurrent roles and relationships across your organization with greater ease. The solution accommodates wide-ranging levels of hierarchies and complex relationships that evolve over time.

You can handle diverse hierarchies thanks to the solution's ability to keep track of each agent's many roles and relationships in a single master record. These relationships can be complex. For example, an agency may be linked to a general agent who is linked to a writing agent, who may, in turn, be linked to a sales manager, and so on.

SAP SuccessFactors Agent Performance Management takes this comprehensive agent data and creates one master record or master ID. It maps any incoming record or ID from an agency, client, license, or system that refers to this agent, connecting it to the master ID. The solution then creates a hierarchy or multiple hierarchies of an insurer's different roles and relationships. You can choose how specific you need this information to be to suit your organization's needs.

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Keep track of agents' constantly evolving relationships from a single source.

Customized Analytics and Reporting

SAP SuccessFactors Agent Performance Management offers reporting tools and hundreds of reporting features that help you measure the productivity of field agents. It also integrates smoothly with the SAP Analytics Cloud solution.

An extensible data model enables you to meet your current business needs and adapt to future requirements. And comprehensive security controls and screen-customization capabilities let you show users the information they need, where they want it.

Each user's landing page features dashboards made of widgets based on the individual's

security group settings. Users can intuitively configure their dashboard by adding or removing widgets and adjusting them to their needs. Core widgets include favorites, summary views, events, tasks, recent forms, and payouts. You can customize access to widgets and activate or disable them as required.

Drawing from one source of accurate, integrated data on your agents, you can intuitively produce and distribute diverse reports to support operational, executive, and partner-specific requirements, aiding smart decision-making.

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Increase visibility and make informed decisions with flexible analytics and reporting.

Enhanced Revenue and Performance with Integrated Processes

SAP SuccessFactors Agent Performance Management helps increase operational efficiency and productivity with streamlined processes that enable better time management, reduced manual work, and a focus on selling.

You can cut IT overheads, from support to operating costs, while enhancing revenue with improved service and tools. The solution also helps reduce overpayments, minimizing manual intervention while automating retroactivity based on your business rules.

Agents benefit from a better user experience with self-services for onboarding and other such processes. Persona-based dashboards support a comprehensive view of sales performance, streamlined data analysis, and data-driven

decision-making. And sales managers can more easily identify where reps may need additional training or support, fostering a more skilled and confident sales force.

With advanced incentive management processes, you can design, distribute, and model agent compensation plans and programs for high numbers of diverse payees and promote desirable behaviors.

SAP SuccessFactors Agent Performance Management also lets you manage your book of business with greater transparency and flexibility. The solution makes it easier to maintain multiple roles and relationships, handling diverse hierarchies by tracking each agent's many roles and relationships in a single master record.

Enhanced Revenue and Performance with Integrated Processes

Summary

The SAP® SuccessFactors® Agent Performance Management solution streamlines onboarding, compliance, and incentive compensation management processes. By increasing planning, performance, and payments visibility, it helps carriers enhance agent motivation and business outcomes.

Objectives

- Integrate diverse systems to create a single source of agent data
- Onboard agents faster in a single process
- Provide clear compensation routes
- Grant visibility into the book of business and historical detail and ownership of customers, policies, and performance
- Manage change with comprehensive audit-trail visibility and detailed audit logs
- Accommodate extensive levels of hierarchies and complex evolving relationships

Solution

- One central hub of agent information
- Support for rules-driven hierarchies, compliance tracking and verification, and the book of business, aiding compensation management
- Extensible analytics and reporting model
- Automated compliance processes and built-in advanced workflows
- Customized, automated self-services for faster onboarding

Benefits

- Improved operational efficiency and lower IT costs
- Optimized management of incentives, compensation, and relationships
- Reduced overpayments
- Enhanced user experience
- Optimized management of the book of business

Learn more

To find out more, call your SAP representative today or visit us [online](#).



