

AgentSync Hierarchy Management: An Intuitive Approach to Reduce Complexity at Scale

Efficiently manage producer hierarchies across your distribution network

Legacy hierarchy management—manual spreadsheets, outdated databases, and cumbersome mainframes—creates risk, friction, and complexity in your distribution processes. When managing 5, 10, or even 20+ downlines, this inefficiency leads to costly compliance errors, incorrect commission payments, and slow producer onboarding, ultimately hampering revenue growth and scalability.

AgentSync Hierarchy Management reduces the chaos to bring clarity, accuracy, and simplicity to managing even the most complex producer relationships. Seamlessly integrated with the AgentSync Manage platform, it ensures your hierarchies are in-step with new appointments and enables a nimble response to regular shifts within distribution channels.

Hierarchy Management ensures your organization is always audit-ready, your commissions accurate, and your teams empowered to scale distribution channels efficiently.

KEY FEATURES OF HIERARCHY MANAGEMENT



AUDIT-READY COMPLIANCE

Maintain comprehensive historical records with effective-dated audit logs, ensuring you're always prepared to show exactly who changed what and when.



COMMISSION ACCURACY

Eliminate revenue leakage with accurate, real-time hierarchy data that provides the foundation for accurate incentive compensation.



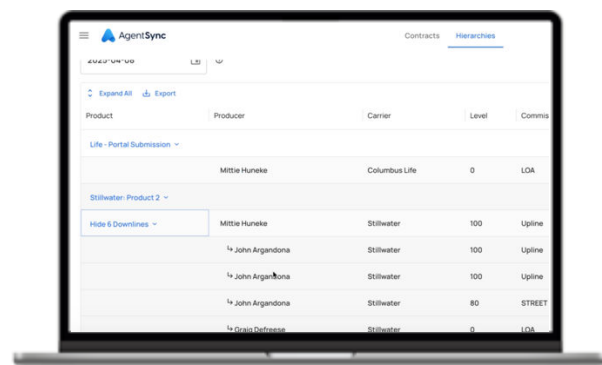
NO ONBOARDING DELAYS

Automated workflows streamline hierarchy updates, drastically reducing onboarding time from weeks to days and getting producers selling faster.



UNIFIED DATA MANAGEMENT

Integrate licensing, contracting, and hierarchy management into one seamless solution, eliminating data silos and simplifying your tech stack.



Drive accuracy and confidence
at scale with Hierarchy
Management

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