Vymo *Smart* Distribution Management Platform

Empowering a Modern Data-Driven Producer Experience

Vymo is an AI enhanced Distribution Management Platform meticulously crafted for the insurance sector. Our suite of modular applications – OnboardIQ and EngageIQ, are engineered to offer a superior producer and administrator experience. Through advanced AI integration and real-time analytics, Vymo drives revenue growth and optimizes operational efficiency. Tailored specifically for Life, Health, and P&C insurance, the Vymo platform ensures precise alignment with your organizational goals and is easily configured to meet your functional requirements. Discover the transformative potential of AI-driven distribution performance with Vymo – where producers excel in a seamless digital-first environment supported by AI enabled administrator functionality.

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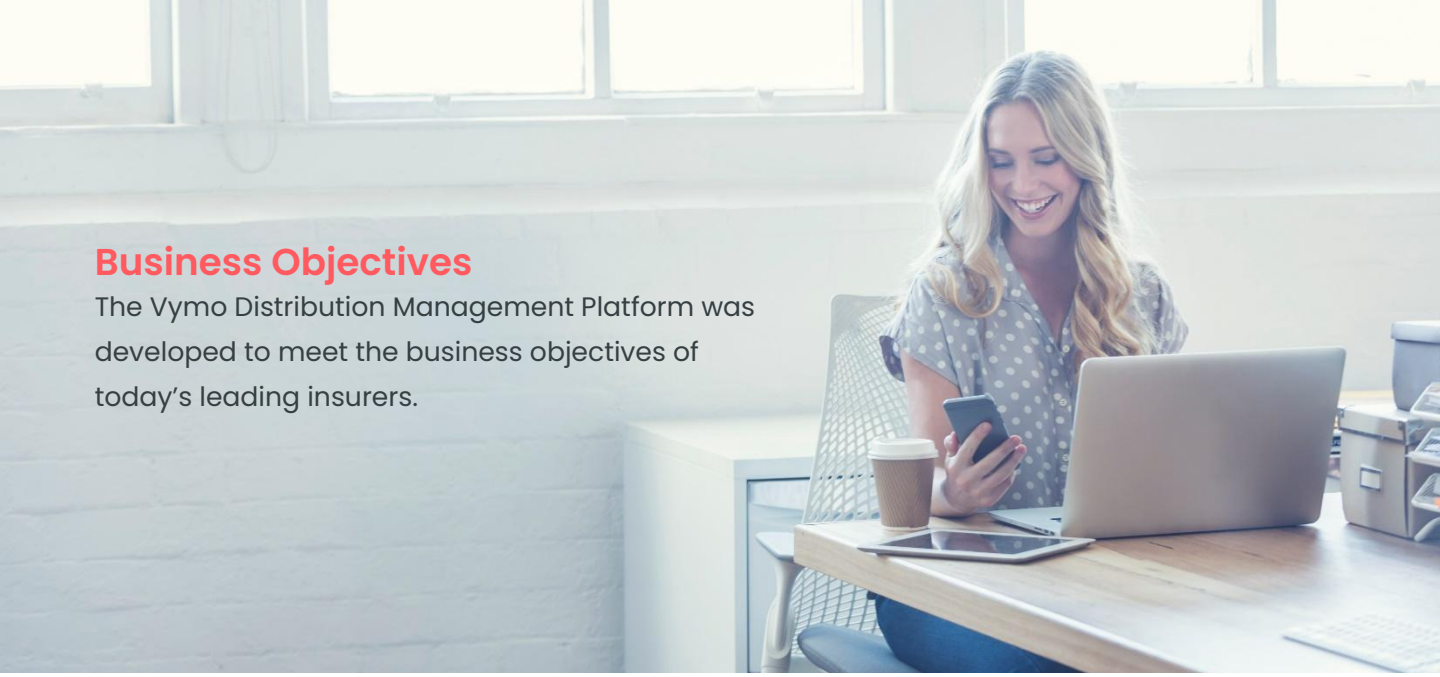
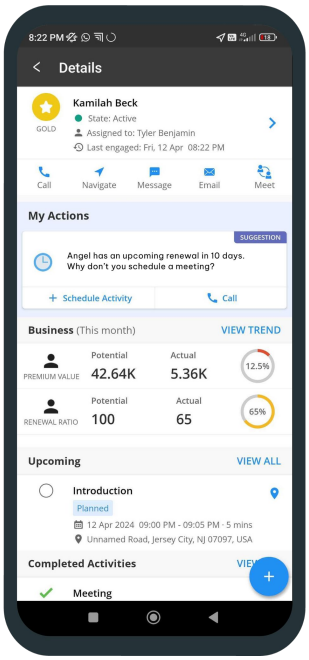


Business Objectives

The Vymo Distribution Management Platform was developed to meet the business objectives of today's leading insurers.

Increase Annual Premium

Vymo is designed to leverage Machine Learning (ML) and Artificial Intelligence (AI) to analyze the sales activities of producers and offer next best actions at the right time, leading to increased production and reduced churn. Vymo EngageIQ will increase up-sell/cross-sell and keep producers on top of pending renewals and policy lapses. At the same time, Vymo EngageIQ presents sales managers with the analytics and coaching tools they need to monitor and proactively manage sales performance.



Reduce Risk

Vymo OnboardIQ will ensure producer compliance for recruitment, onboarding, appointment, and monitoring of continued education. Vymo helps identify and recruit high quality candidates, resulting in reduced churn in your distribution channels. Integrations to external organizations such as NIPR and background check organizations will ensure compliant onboarding with "Just-In-Time" appointments and timely alerts to keep critical information up to date. Vymo also monitors producer performance KPIs to help you identify patterns that may be indicators of fraudulent behavior or risk.

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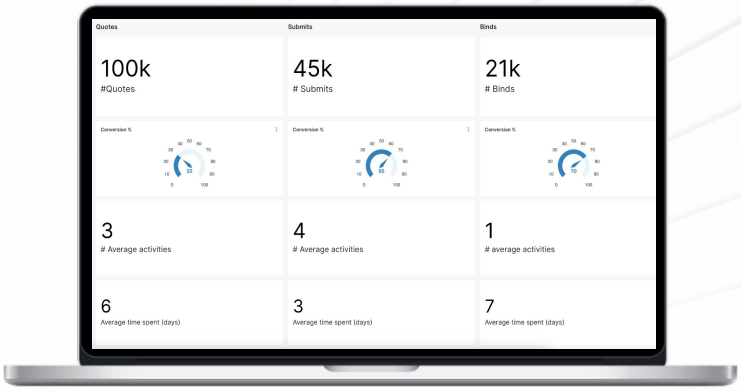
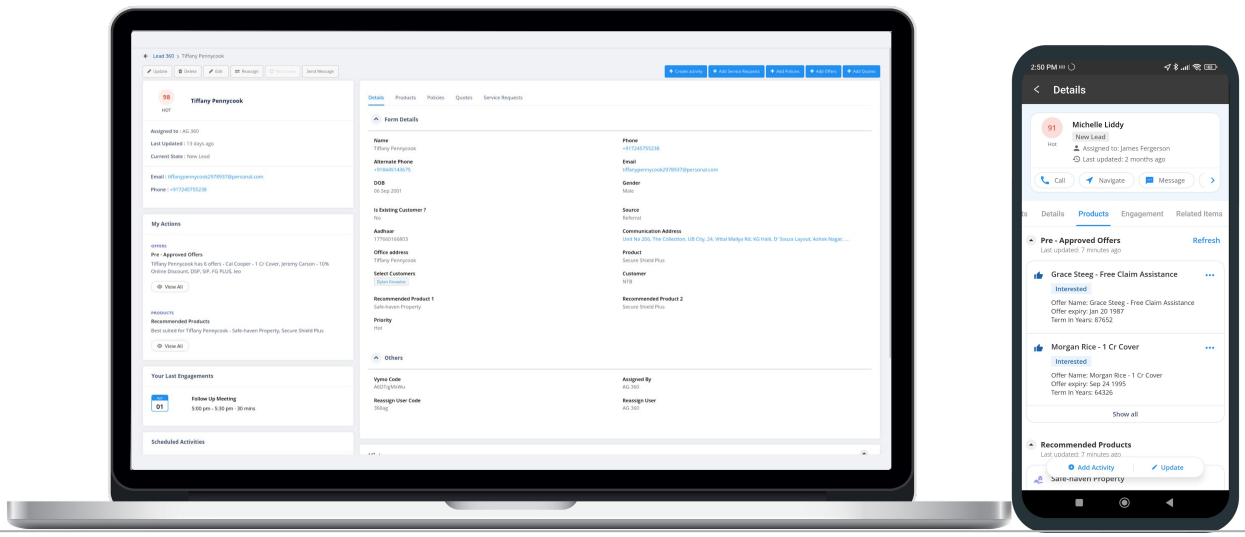
Reduce Administrative Costs

Vymo features integrated workflows to automate manual processes and deliver straight-through processing wherever possible. Vymo can ingest data from multiple sources and apply ML and AI to identify bottlenecks in processes leading to additional efficiency gains. Modern streamlined administrative desktop applications will make life easy for your administrators. In addition, our mobile solutions will reduce administrative costs for your producers, leading to increased brand loyalty.



Reduce Customer Churn

Vymo EngageIQ is designed to ensure that your policyholders receive the attention they deserve. With AI driven mobile-first solutions, your producers will be provided with the next best action to take for every lead and policyholder. Producers will always have instant mobile access to their entire book of business. Sales managers will have the tools they need to identify performance issues that are impacting persistence ratios and will be able to act and correct issues in real time.



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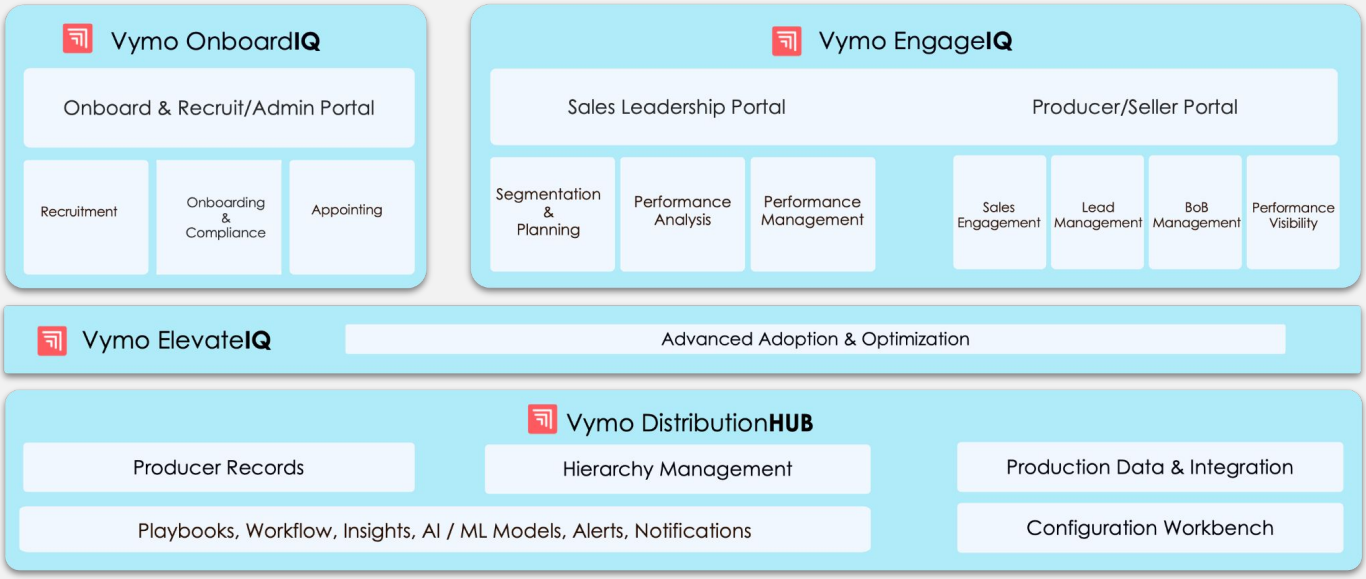
Vymo DistributionHUB

Distribution Hub is the core of the Vymo Distribution Management Platform. It gives you the ability to develop and manage multiple, complex hierarchies that can be used for modeling commissions, sales management, office locations, marketing relationships, and more. No more "black box" solutions - Vymo puts your team in control of ongoing configuration. Distribution Hub includes an administrative workbench allowing you to manage KPIs, rules, workflow, reports, and documents. In addition, Distribution Hub features an Integration Manager that provides pre-built, smart integrations allowing you to manage additional integrations for production data. All data generated by or integrated with Vymo can be utilized for ML and AI interactions, and reporting.



Vymo OnboardIQ

AI Enabled Recruiting, Onboarding, and Compliance. Transform your recruiting, onboarding, and compliance procedures with our digital-first application; meticulously crafted to enhance the producer experience and ensure seamless efficiency across every stage of the process. This includes a full end-to-end workflow driven onboarding process with integration to NIPR and other key industry data sources.

*see data sheet

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Vymo EngageIQ

Coach to Win. Experience the pinnacle of sales leadership with best-in-class tools and analytics. Designed to empower leaders, Vymo EngageIQ provides seamless performance monitoring, personalized coaching, proactive action suggestions, and ensures optimal results for producers and agencies alike.

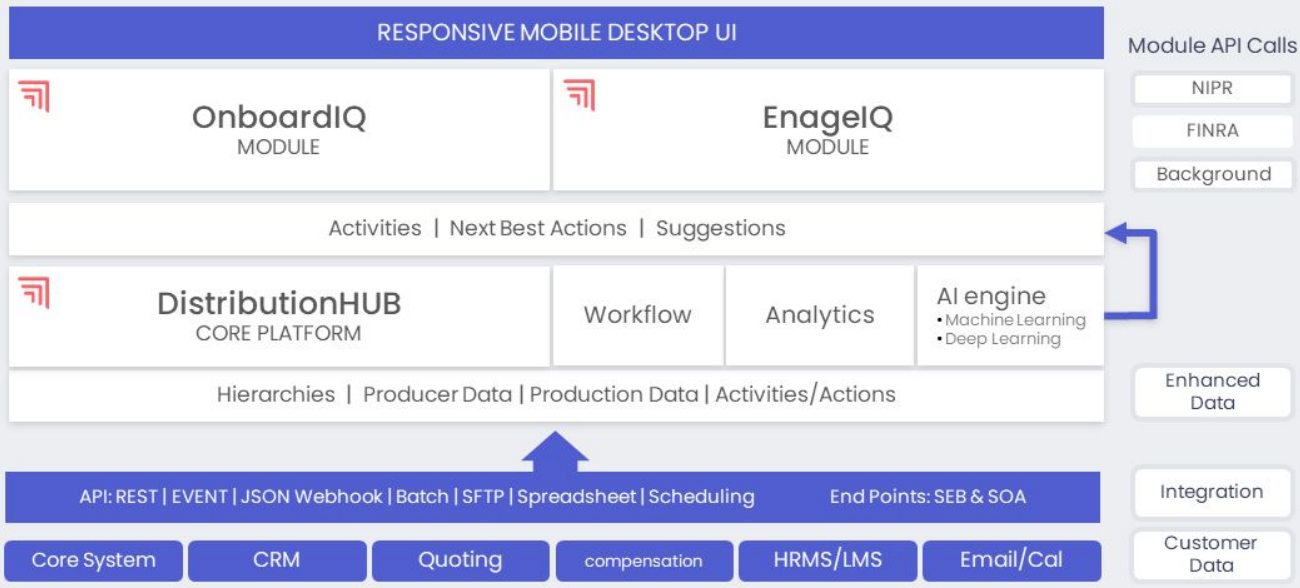
*see data sheet

Vymo EngageIQ

Empower your Sellers. Elevate the producer experience with our innovative application of machine learning and AI management, designed to empower producers with unparalleled convenience and productivity. Seamlessly manage leads, maintain your book of business, and access performance metrics anytime or anywhere, translating to invaluable results and a superior producer experience.

*see data sheet

DistributionHUB Integration



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Why Vymo Distribution Platform

Vymo's *AI enhanced* Distribution Management Platform transforms distribution performance, placing utmost importance on enhancing the producer experience throughout the entire lifecycle. Vymo consolidates essential tools into one seamless application and eliminates inefficiencies and frustrations associated with scattered information. Empower sales leaders and producers to drive sales and lead teams effortlessly, ultimately maximizing productivity and success.

- Recruiting
- Onboarding
- Compliance
- Training
- Enterprise KPI Management
- Producer Management
- Performance Management
- Lead Management
- Sales Enablement
- Book of Business Management
- Activity Tracking
- Hierarchy Management

Selling Technology Driven by a Modern Technical Stack

At the heart of the Vymo Distribution Management Platform, Machine Learning (ML) and Artificial Intelligence (AI) enhances both distribution transformation and the producer experience. Vymo OnboardIQ and EngageIQ are seamlessly integrated with the industry-leading platforms: NIPR, Salesforce, Microsoft Dynamics, Zoom, etc; and easily integrated with leading third party or home-grown administration systems. Through real-time integrations, Vymo provides essential insights and tools empowering your team to thrive and succeed.

Vymo's technology is built with many foundational elements that our customers look for:

- **Verticalized:** Solutions and expertise are focused on Financial Services
- **Modern**: Micro services, event driven, extensible
- **Secure:** SOC2 Type II Compliant, ISO/IEC 27001:2013 Certified, GDPR Compliant
- **Scalable:** Horizontally scalable, cloud native, highly available, and redundancy built-in
- **Multi Device**: Native mobile and tablet apps (iOS, iPadOS, Android), fully responsive web app
- **Enterprise Ready:** Support for deep integrations, complex hierarchies, mission critical business needs
- **SaaS**: Multi-tenant, global hosting by Microsoft Azure

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Vymo DM Platform: **Value to Execution**

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Vymo DistributionHub

The core of Vymo's platform where you can manage your producer records, hierarchies, integrations, and data.

Vymo DistributionHub Feature List

- Multilingual Platform
- AI Engine
  - Machine learning
  - Deep learning
- Nudge Framework
  - Playbooks
  - Actions
- Administrative Workbench
  - Manage KPIs
  - Rules editor
  - Workflow management
  - Report developer
  - Document management
- Producer Data
  - Individual producers
  - Agencies
  - Enterprise Book of Business
- Hierarchies Management
  - Role based access control
  - Management/sales hierarchy
  - Agency hierarchy
  - Territory hierarchy
  - Product matrix
- Acquisition and Merger Flexibility
  - Producer data
  - Flexible hierarchy changes
  - Integrationsz
- Smart Integration Manager
  - Administrative Hub
  - Salesforce smart integration
  - Microsoft Dynamics smart integration
  - Internal CRM
  - Workday HR smart integration
  - Internal HRMS
  - Zoom smart integration
  - Gmail and Google Calendar smart integration
  - Outlook Mail and Outlook Calendar smart integration
  - Quoting applications
  - eApp applications
- Core Production Data
  - Policy, Claims, Billing
  - Customer (CRM)
  - Performance aata
  - Other as needed

Visit for more info →

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Scan this QR to Schedule a Demo

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