

## SECTION 4: MANAGE YOUR PARTNER NETWORK

<b>MANAGE YOUR PARTNER NETWORK</b> Organize and optimize your Partner and Agent network		
TOPICS	DETAILS	COMPLETED
Navigate Your Partner Network	Navigate through your hierarchy and all of the various business units in the downline including Sales Managers, firms, offices and Agents	
Explore Your Partner Network	Explore your partner network and their in force book of business as well as business insights including sales and service opportunities	
Sales Trends & Reporting	Access sales & production statistics for all downline firms and Agents	
Agent Profiles & Access	<ul style="list-style-type: none"> <li>• Explore Agent information including their in force book</li> <li>• Enable Agents with access to their in force book</li> </ul>	
Agent Segmentation & Lists	Segment your Agent network based on performance or other attributes	
Dormant Agents	Identify dormant Agents and explore their in force book	
Firm and Office Profiles & Access	<ul style="list-style-type: none"> <li>• Explore firm information including their in force book</li> <li>• Enable your partners with access to the firms in force book</li> </ul>	
Firm Segmentation & Lists	Segment your partner firms based on performance or other attributes	
Sales Manager Profiles & Access	<ul style="list-style-type: none"> <li>• Explore Sales Manager information including downline firms &amp; Agents and their in force book</li> <li>• Enable your Sales Managers with access to their in force book</li> </ul>	
Direct Messaging	Secure, direct instant messaging with your Agents on NIC	
Broadcast Messaging	Secure, direct instant messaging to lists of Agents on NIC	
Document Sharing	Secure document sharing with Agents	
Marketing to Agents	Market your services and events to your Agents	

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Organize and optimize your Partner and Agent network

TOPICS	DETAILS	COMPLETED
Book of Business Acquisition	Access Agent book of business information to assist with book of business valuations	