

Convey Insurance

Key Features

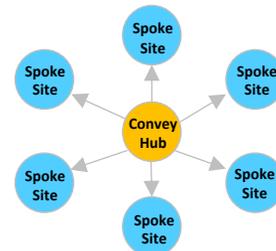


Single Sign On & Member API

Convey's API lets members login to the company's primary portal, click a link and be logged into Convey. Members are established inside Convey using data from the company's administrative portal. Programming to integrate Convey requires only 1-2 days of development.

Carriers and Vendors update Agency Partnerships with Hub & Spoke

Convey portals are a connected network of portals. Carriers and vendors add content to a primary catalog on the hub-site and deliver it downstream to one or more connected portals. Member agencies can be informed, updated and engaged all at once.



Offer automated email marketing campaigns with Conduct

Use Conduct Campaign to develop email marketing campaigns and deliver them to site members. Campaigns come with multiple outbound emails, a landing page and detailed reports on email and sign-up response. Emails and landing pages are branded for each site member and their contacts are independently protected by Conduct's ListLock™ technology.

Promote partner interaction and new ideas with discussion forums

Discussion forums allow agency partnerships to exchange ideas, strategies, or market searches with other site members. The result is more educated, engaged and inspired affiliate. Forums are designed to create conversation categories, moderate discussions and send email notifications when there are new conversations or replies.



Automate member management

Automatically add members to Convey from your primary portal using Convey's API or allow them to fill out an application to join the portal. Set up the member CRM with custom fields to keep track of partners and feed data into the CRM through the application process or profile updates from the member dashboard.

Communicate to members to update them and inspire them to action

The Message Library produces email notifications and reminders and delivers custom messages and newsletters to site members. Use the Message Library to consistently engage members and keep them updated. Emails are CAN/SPAM compliant, have opt out management, and reports to detail the delivery status.



Use reports to track partner activity and interest.

Convey has a library of reports to track member activity, form submissions, email outreaches, Conduct campaigns and CRM data. Use the site reports or create custom reports that are specific to your needs.