



Inforce Action Center

Exclusively Available on the Simplicity Agent Center

The screenshot displays the 'My Insurance Business Inforce Action Center' interface. It features a sidebar on the left with navigation options like Home, My Business, Alerts, and Settings. The main content area is titled 'Top Opportunities' and contains three panels for 'Alan Temple', 'Carl Kelly', and 'Lillian Brown'. Below these panels is a table of 'Policy Opportunities' with columns for Policy Number, Type, Client, Status, Value, and Action.

Policy Number	Policy Opportunity	Type	Client	Status	Value	Action
1234567	Annual Policy Expiration	Annual	Alan	Active	\$100,000.00	Alert Email
7890123	Annual Policy Expiration	Annual	Alan	Active	\$200,000.00	Alert Email
4567890	Annual Policy Expiration	Annual	Alan	Active	\$150,000.00	Alert Email
9876543	Annual Policy Expiration	Annual	Alan	Active	\$300,000.00	Alert Email
2345678	Annual Policy Expiration	Annual	Alan	Active	\$180,000.00	Alert Email
5678901	Annual Policy Expiration	Annual	Alan	Active	\$250,000.00	Alert Email
8901234	Annual Policy Expiration	Annual	Alan	Active	\$120,000.00	Alert Email
1098765	Annual Policy Expiration	Annual	Alan	Active	\$280,000.00	Alert Email
3210987	Annual Policy Expiration	Annual	Alan	Active	\$160,000.00	Alert Email
6543210	Annual Policy Expiration	Annual	Alan	Active	\$220,000.00	Alert Email

The Inforce Action Center is your new dedicated hub for ongoing client engagement and policy servicing and it is available exclusively through the Simplicity Agent Center. It combines data-driven insights with automated tools to help you connect with the right client at the right time - supporting stronger client relationships while uncovering new revenue opportunities.

Redefining Advisor Support

By transforming inforce information into clear, prioritized actions, the Inforce Action Center empowers you to proactively manage your book of business, deepen client relationships, and uncover growth opportunities that might otherwise be missed.

What the Action Center Does for You:

- **Protect Your Business:** Receive automated alerts for lapse risks, and payment reminders.
- **Uncover New Revenue:** Identify immediate opportunities for term conversions, and coverage gap analysis.
- **Automate Engagement:** Execute annual policy reviews and client touchpoints with zero administrative lift.

How It Works

The Inforce Action Center continuously analyzes your inforce data and converts it into timely, prioritized alerts and opportunities, delivered directly within the Simplicity Agent Center. These insights clearly highlight where action is needed and where opportunities exist, allowing you to stay proactive and take meaningful action without adding administrative work to your day.



Get Notified



Review Opportunity



Start Conversation