



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 with columns for Policy Number, Type, Client, Status, Value, and Action. The table lists several policy opportunities for different clients, including Alan Temple, Alan Daniels, Alan May, Cynthia Brown, Carl Kelly, Jay Landman, Lillian Brown, and Michael Kelly.

Policy Number	Policy Opportunity	Policy Number 1	Type 1	Client 1	Status	Value	Action
1234567	Annual Policy Expiration	1234567	Annual	Alan	Active	\$100,000.00	Alert Email
7890123	Annual Policy Expiration	7890123	Annual	Alan	Active	\$200,000.00	Alert Email
4567890	Annual Policy Expiration	4567890	Annual	Alan	Active	\$150,000.00	Alert Email
9876543	Annual Policy Expiration	9876543	Annual	Alan	Active	\$300,000.00	Alert Email
2109876	Annual Policy Expiration	2109876	Annual	Alan	Active	\$180,000.00	Alert Email
3456789	Annual Policy Expiration	3456789	Annual	Alan	Active	\$250,000.00	Alert Email
6789012	Annual Policy Expiration	6789012	Annual	Alan	Active	\$120,000.00	Alert Email
0123456	Annual Policy Expiration	0123456	Annual	Alan	Active	\$90,000.00	Alert Email
5432109	Annual Policy Expiration	5432109	Annual	Alan	Active	\$110,000.00	Alert Email
8765432	Annual Policy Expiration	8765432	Annual	Alan	Active	\$130,000.00	Alert Email
1098765	Annual Policy Expiration	1098765	Annual	Alan	Active	\$160,000.00	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



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