

CENTRALIZE. AUTOMATE. STAY COMPLIANT.

PCRM: Compliance Infrastructure for Insurance Distribution

3.5M+
Licenses Managed

10M+
Compliance Transactions
Processed

4.5M+
Appointments Managed

600+
Insurance Organizations
Supported

PCRM connects licensing, onboarding, and regulatory data into a single operating system that drives producer readiness and accelerates distribution growth.

The Problem Today

Insurance distribution still runs on fragmented systems with no single source of truth. Manual workflows slow onboarding and execution, while inconsistent licensing and producer data create real compliance risk. Teams lack visibility across processes, and operations leaders can't see producer readiness in real time.

What PCRM Is

PCRM is the centralized system of record for producer data, an end-to-end lifecycle platform spanning onboarding, licensing, appointments, and terminations. Built for state-level regulatory complexity, it connects compliance workflows directly to operational execution, so the work of staying compliant happens in the same place the business gets done.

What PCRM Delivers

Four operating capabilities that turn fragmented compliance work into a coordinated system.



Centralized Data & Workflows

One source of truth for producer credentials, documents, and tasks.



Standardized Processes

Consistent onboarding, licensing, and appointment workflows across every team.



Automated Compliance

NIPR-synced execution, renewals, and regulatory updates without manual touch.



Real-Time Visibility

Live dashboards on producer readiness, exceptions, and audit posture.

Built To Run The Full Producer Lifecycle

Capabilities are grouped by the operational work they support, every group connects through the same producer record.



Licensing + Appointments

- › Automated tracking synced with NIPR
- › Bulk processing of appointments and terminations
- › Just-in-time appointment workflows



Onboarding + Workflow

- › Electronic onboarding portal
- › Contracting and document workflows
- › Task automation across teams



Compliance + Monitoring

- › Regulatory and license alerts
- › CE tracking and renewal reminders
- › Audit-ready reporting



Data + Reporting

- › Dashboards and reporting engine
- › Data reconciliation and synchronization
- › API and data exchange across systems

Outcomes That Matter

PCRM customers operate compliance as infrastructure, not as overhead.



Scale producer onboarding and licensing without increasing headcount



Reduce compliance risk and the manual effort that creates it



Accelerate onboarding and shorten time-to-revenue



Increase operational capacity through automation and workflow efficiency

Who It's For



Carriers



MGAs



Agencies



Adjusting Firms / TPAs