

# Verify and Track Your Producers' Completions of NAIC Product-Specific Training and Insurance CE with The Success Management System (SMS)

- *Do you need to verify completion for product-specific training courses?*
- *Are you aware of the new tracking requirements for product-specific training and NAIC Annuity Training, Long-Term Care, Ethics, Laws/Regulations and other CE now required by states and the NAIC?*
- *Have all of your producers completed their new state CE requirements for license renewal?*



## Solve These Problems with The Success Management System!

Whether you want to have your producers complete their product-specific training and NAIC CE courses with instructor-led (classroom) or online, Success CE has the solution.

Keep your producers promoting your products! We offer the **Success Management System (SMS)** to help you track your producers' product training and CE progress to keep them in compliance. **Available for both live (classroom) and online formats!**

- ↑ Customized and Co-Branded website for your producers to complete their product-specific training.
- ↑ Customized and Co-Branded website for your producers to complete ALL of their state CE requirements.
- ↑ Success Track -- The online tracking software for product-specific training and state-specific CE.
- ↑ Success Live Track -- The tracking software for Live CE (Instructor-Led Classroom) CE and product-specific training.
- ↑ All state-specific Annuity Certification, Ethics, Long-Term Care, plus any other state CE requirements included in one low package price.
- ↑ Real-time reporting to your systems of producer completions for both product-specific training and state CE requirements.
- ↑ Client administration panel for report generation (7/24/365).

## SMS Tracking Features

### 1. Alarm Technology

Alert licensees when their CE requirements are coming up and help them stay in compliance.

### 2. Knowledge Track

Track all of your insurance agents and/or financial advisors' completions with Life/Health plus Property/Casualty, CFP, and other licenses.

### 3. Course Knowledge Track

Track by separate course completions such as state-specific required CE for Annuity Training, LTC, and Ethics.

### 4. Total Completion Track

Track to ensure all reps have met their renewal requirements even with the new state and NAIC requirements.

### 5. Branch/Territory Knowledge Track

Track by geographical location.

**Contact Shelley Bell Today at (770) 783-0174 for More Information**