

CASE STUDY

REGED & FAYE STREAMLINE INSURANCE AGENT ONBOARDING



ABOUT REGED

RegEd is a market-leading provider of RegTech and InsurTech solutions that enable financial services firms to deliver a frictionless user experience to their agents.

Founded by former regulators, RegEd serves more than 200 clients, including many of the nation's top financial institutions.

Its flagship "Xchange" solution helps insurers streamline compliance and onboarding processes, enabling agents to get to market faster while maintaining operational excellence and regulatory integrity.



THE CHALLENGE

RegEd sought to extend its market-leading Xchange platform by simplifying and modernizing the insurance agent onboarding process.

Traditional insurer onboarding processes were:

- Heavily manual and paper-driven
- Dependent on manual review and signatures
- Disjointed between insurers and channel partners
- Time-consuming, delaying agents' ability to place business

The objective was clear: eliminate human intervention where possible, reduce manual effort, and create a seamless, real-time onboarding process between insurers and agencies.

RegEd needed a scalable solution that could support Salesforce ISVforce and be distributed through Salesforce AppExchange – while delivering enterprise-grade efficiency and usability.

"Faye takes the time to truly understand the business use case, desired end state, ideal solution(s) and how to best create/implement identified solutions. Faye is not just a vendor we use, but rather a partner we rely on."

- Senior Vice President of Product Management



THE SOLUTION

RegEd partnered with Faye to develop a Salesforce-based AppExchange application that centralized and automated the agent onboarding lifecycle.

Contract Management System

A streamlined contract management system was built within Salesforce, enabling agencies to:

- Create and track contracts
- Manage applications and documentation
- Monitor approval timelines

This established a centralized hub connecting insurers, agencies, and RegEd in real time.

Automated Flows

Using Salesforce Flows, Faye simplified the contracting process by:

- Capturing required data from agencies
- Automating document generation and distribution
- Integrating email and DocuSign for digital signatures

Templated flows enabled administrators to accelerate onboarding while reducing manual effort.

Scheduled Jobs & Automation

Scheduled jobs were implemented to:

- Track document status updates
- Automate background check reviews
- Trigger workflow progress based on submissions and signatures

This minimized human intervention and ensured a seamless onboarding lifecycle.

Enhanced User Experience

An intuitive, adoption-focused interface was designed to improve usability and visibility. Key features included:

- Action buttons for updating contact and license data
- Custom dashboards for tracking quotas, contract status, and time-to-close
- Configurable settings for field mapping and workflow customization
- A U.S. licensing map and API-powered agency hierarchy chart
- A CSV import tool within Experience Builder to bulk-create partners and auto-generate contracts

The result was a scalable, highly configurable solution that prioritized automation, visibility, and user adoption.



RESULTS

The transformation delivered a powerful, centralized onboarding ecosystem that:

- Eliminated manual contracting bottlenecks
- Reduced onboarding time and accelerated agent time to market
- Enabled real-time collaboration between insurers and agencies
- Increased operational efficiency through automation
- Delivered actionable visibility through dashboards and reporting
- Created a scalable ISVforce application available on the Salesforce AppExchange

Most importantly, agents gained the ability to complete onboarding and begin placing business immediately – turning what was once a fragmented, manual process into a seamless digital experience.

