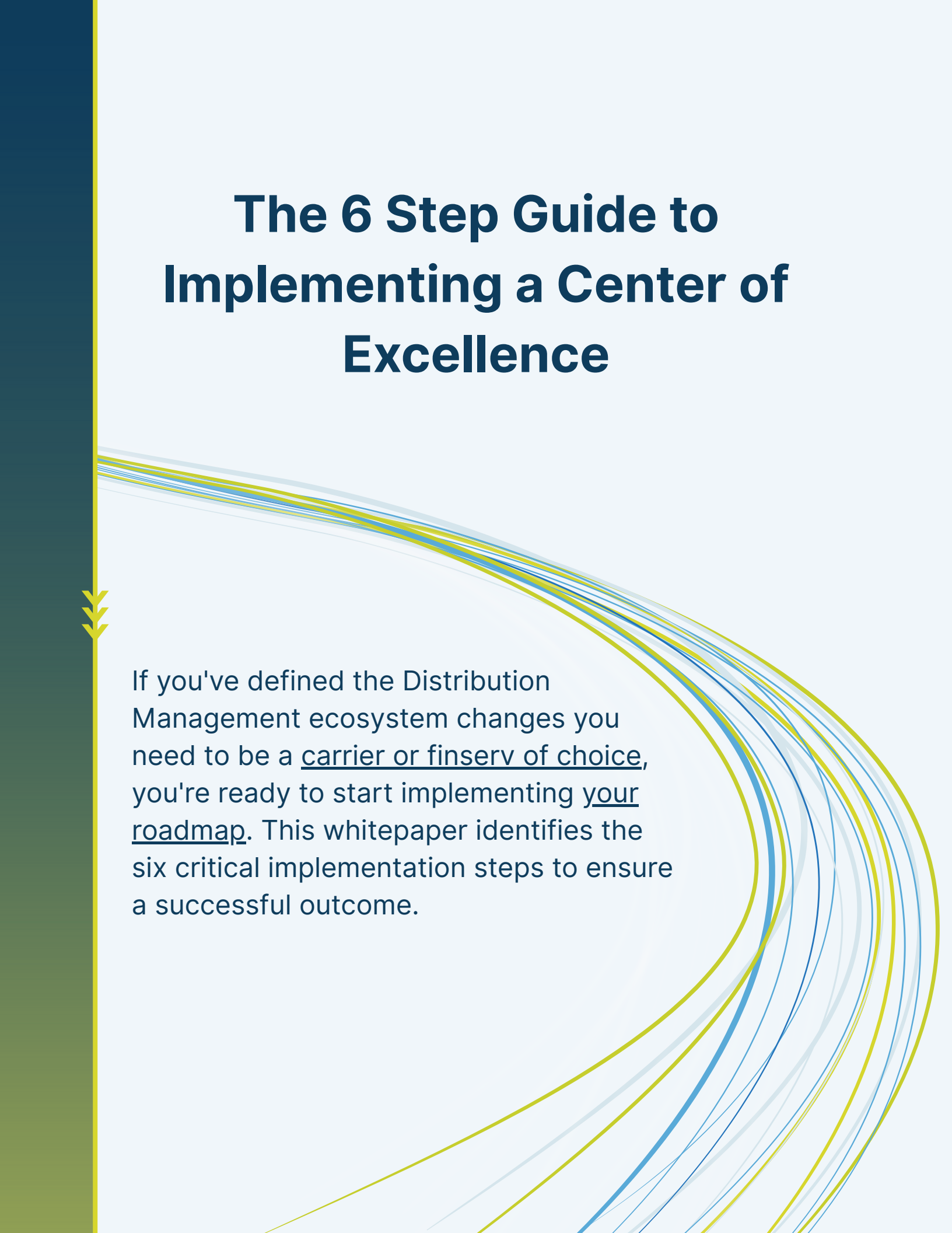# The 6 Step Guide to Implementing a Center of Excellence

If you've defined the Distribution Management ecosystem changes you need to be a carrier or finserv of choice, you're ready to start implementing your roadmap. This whitepaper identifies the six critical implementation steps to ensure a successful outcome.

Phase 1: Stabilize and Establish Credibility

Milestone 1: Clean Up Data to Enable Trust
Milestone 2: Set a Transparent Payment Calendar
Milestone 3: Deliver Accurate Payments and Clear Holds

Phase 2: Eliminate Manual Errors and Empower Brokers

Milestone 4: Enable Broker Self-Service with Proactive Alerts
Milestone 5: Accelerate Broker Onboarding
Milestone 6: Leverage Analytics and AI for Strategic Growth

Phase 1: Stabilize and Establish Credibility

The first three milestones help you build the trust you need to win broker confidence and improve your brand reputation. These steps are foundational—and need to be completed as quickly as possible to stop the bleeding.

Milestone 1: Clean Up Data to Enable Trust

Every improvement starts with data integrity. That means ensuring that the data used to calculate commissions—whether for policyholders, members, or products—is complete, accurate, and easy to find. When brokers can see the same data you're using and everything matches their expectations, **the foundation for trust begins to form.** If you're coming off of a manual system, correcting historical data quality issues is one of the most crucial early steps in reestablishing credibility.

Milestone 2: Set a Transparent Payment Calendar

Trust doesn't come overnight. But clarity around payout timing is an important early win. Establishing a standard and visible commission calendar gives brokers something to count on—even before you've earned their full confidence. This **transparency shows brokers you're serious about professionalism** and are actively moving toward operational consistency.

Milestone 3: Deliver Accurate Payments and Clear Holds

Once your data is clean and your schedule is public, the next priority is delivering on those expectations. That means consistent, accurate payments—and when something's wrong, brokers can clearly see why. Whether it's a licensing issue, an incomplete profile, or missing documentation, making that information visible **prevents frustration and builds credibility over time.**

Phase 2: Eliminate Manual Errors and Empower Brokers

Once you're stable, it's time to scale. The next three milestones focus on eliminating bottlenecks and enabling broker autonomy through digital tools, self-service, and intelligent data access.

Milestone 4: Accelerate Broker Onboarding

Your brokers don't want to wait a week to start earning. Rapid onboarding enables new producers to become "ready to sell" the same day, ensuring they can start closing deals and generating commissions immediately. With automated workflows and seamless system integration, onboarding becomes a streamlined experience—no manual approvals, no bottlenecks.

Milestone 5: Enable Broker Self-Service with Proactive Alerts

When brokers can answer their own questions through a web-based portal, everyone wins. No more waiting on call centers or back-and-forth emails just to fix an address or see the latest commission statement. Self-service portals also allow you to send proactive alerts—such as notifications of expired licenses—before they become payment blockers.

Milestone 6: Leverage Analytics and AI for Strategic Growth

Once your data is accurate and accessible, **it becomes more than a reporting tool—it transforms into a growth engine.** Brokers and internal stakeholders can use analytics to understand commission trends, evaluate rate changes, and even apply AI to optimize sales strategies. Some organizations are already building "companion AI" tools to guide brokers through system processes and make recommendations based on predictive insights.

From Manual Mayhem to a Center of Excellence

These six milestones aren't just steps on a project plan. They're the turning points that **transform your external channel operations from inconsistent and reactive to transparent, accurate, and broker-friendly.**

Whether you're still in the early phases of data cleanup or are ready to unlock your system's full analytical potential, these two phases give you a roadmap toward operational maturity—and **a reputation your distribution partners can trust.**

Ready to become a center of excellence? **Reach out to our experts for a free consultation.**

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