



BlueSky Insurance Agency

Company snapshot

BlueSky Insurance Agency is a family-owned, full-service agency located in Richmond, Virginia. For over 20 years, BlueSky has been providing end-to-end consultation to their customers by helping them make the best possible choices in a complicated insurance environment. The agency is forward-looking, comfortable with change, and hyper-focused on the customer.

Appropriately, BlueSky was awarded a 2019 Liberty Mutual "Agent for the Future Award."

"We are absolutely in love with AMS360. It's the best system out there."

Linda Kennedy,
CXO,
BlueSky Insurance Agency

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Vertafore® Solutions:

AMS360®

Orange Partner
Integrations

Proven results:

- Enhanced the customer experience through automation and increased the ease of doing business
- Expanded reporting capabilities to gain a better understanding of business performance and customer health
- Improved the employee onboarding process with standardized resources geared towards quick and effective learning

BlueSky takes a comprehensive approach to insurance. The goal: enabling every one of their clients to achieve the American dream. They believe that the customer is at the heart of any business and that by adopting the right technology, they can show up for their customers in the ways that matter most.

Chief Experience Officer, Linda Kennedy co-owns the agency with her brother Charles and has been with BlueSky for over 13 years. Kennedy's main responsibility is driving the vision throughout the organization, followed closely by focusing on the customer experience.

When asked what she envisions for the agency, Kennedy says, "We have an idea of moving towards a modern insurance agency model where we are focused on automation while holding onto that human interaction. That's what makes us different, is that human touch."

Getting closer to the customer

Kennedy recognizes the nuances of being an independent agency in today's tech-forward world. She understands that it's not about eliminating the human connection but using technology to make that connection even stronger.

"We know we are not competing with our next-door insurance agency," Kennedy says, "we are competing on a broader level of what clients expect... What we need to think about as a

business is how can we make it easier for our clients to do business with us?"

For BlueSky, partnering with Vertafore and adopting meaningful technology was the answer. Kennedy and her team evaluated every management system under the sun but, as she puts it, "AMS360 was the most sophisticated, robust system that was going to grow with us as our agency grows... Being a holistic agency where we're taking care of different aspects of our clients' lives, we needed a system that was going to be able to take care of our commercial lines, our life, our benefits, and our auto."

Kennedy's passion for the customer experience was a significant factor in BlueSky's decision to go with AMS360.

It helps them deliver the consistency and quality that she believes is a key driver of their success. "One of the things that is super important to us is to maintain the same client experience from person to person," Kennedy says, "at Starbucks for example, you have your favorite latte, you go in and it tastes the same every time. That consistency is what people look for."

AMS360's standardized workflows help BlueSky provide reliable service to every customer. Additionally, advanced reporting capabilities give the agency visibility into customer retention, allowing them to focus on reducing churn.



A best-in-class platform

For BlueSky, a strong management system was just the beginning. Vertafore's open platform also played an important role in the team's purchasing decision. "Where Vertafore may not have the solution you're looking for, they do an excellent job of getting someone who is great at it and partnering with them," Kennedy says, "you've got this super capability with AMS360 plus all of these other add-ons that really make it best-in-class." Kennedy is referring to Vertafore's Orange Partner Program which brings together complementary solutions from third-party partners. Using available APIs, these industry-leading partners integrate directly with Vertafore products to provide top-notch additional capabilities.

Fuse by Agency Revolution

BlueSky has adopted several Orange Partner solutions including Agency Revolution's Fuse, an automated marketing tool that helps agencies stay in touch with their clients.

"As our agency grew, we knew it would become increasingly difficult to provide a personalized experience to each client," Kennedy says, "we needed to work smarter, not harder."

Fuse allows BlueSky to preserve their superior client experience while keeping payroll expenses at bay.

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With Fuse, Kennedy says, "We can provide specific campaigns that automatically go to the right clients. It has enhanced our cross-selling capabilities, provided an easy way of sending out mass communications with easy newsletter templates, and even communicates in text or post card formats. All of this occurs automatically from triggers in AMS360. Agency Revolution is our little secret for providing clients and prospects truly caring, informative, and resourceful constant communications, so we are always top of mind and guiding them throughout the year."

Bridge by Kotter Group

The Kotter Group's Bridge is a communications platform built for insurance agencies. It offers eSignatures, text messaging, live chat, a VoIP phone system, and more to make BlueSky's job easier.

"It has absolutely helped with optimizing efficiency between our phone system and AMS360," Kennedy says, "whenever a call comes in, the client's information is already popped up and we can greet them by name. It makes for a highly efficient and personalized experience."

The Bridge also allows the BlueSky team to conduct video proposals and provide 'whisper coaching' to colleagues to give quick tips or help guide the conversation during customer calls.

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Easy access to learning opportunities

However, new technology isn't always as simple as just plugging it in. There's often a learning curve and sometimes roadblocks. Luckily, Vertafore has in-depth training and learning opportunities to make sure agencies can get the most out of their systems.

From on-demand tutorials, to ongoing live webinars, to a dedicated support team to assist BlueSky's employees, Vertafore provides resources that BlueSky takes advantage of regularly. On top of that, the Network of Vertafore Users (NetVU) is a community and peer-to-peer resource that's freely accessible to all Vertafore customers.

"We love the educational opportunities that are available through Vertafore's support, as well as through NetVU," Kennedy says, "The training is so robust that we've incorporated it into our own employee onboarding experience. And the NetVU organization is so valuable to us that I've stepped into a leadership role."

As part of Vertafore's best-in-class platform, AMS360 is an agency management system that provides the foundation for independent agencies to grow their business and boost their profitability. It helps streamline workflows, improve renewals and retention, and drive new business resulting in improved employee productivity and a superior customer experience.

AMS360 provides:

- Automatic alerts to help you stay on top of renewals and rate increases so you can increase your retention rate
- Advanced reporting capabilities to help you gauge performance and better serve your customers
- Access to industry-leading solutions that integrate seamlessly with your agency management system

To learn more about AMS360, call us at
800.444.4813 or click below.

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