
How the Best Agencies Stand Out

Why Customer Retention, New Business,
and Personalized Communication Matter.

The Foundation for Future Success.

Independent agencies today face an increasingly commoditized market, with new competitors constantly on the rise, and technology startups continually posing challenges to the traditional agency model. In order to ensure future success, it's important to first start with a solid foundation: put in place the technology and tools that will help you focus on remaining competitive and preparing for future growth.

A solid foundation includes three basic areas that the independent agent can hone in on in order to prepare for success: retaining existing customers, identifying new business opportunities — both with existing customers as well as prospects — **and connecting with customers in a way they want to communicate.**

Focusing on these areas will help independent agents ensure they are prepared for the future.

"To be successful, you have to think about the future. The ones who are successful are the ones who stay one step ahead of the game."

Rob Macoviak, President, Oyer, Macoviak and Associates, Palm Beach County, Florida

Retain Your Existing Customers.

Increase Customer Retention and Renewals

One way that independent agents can ensure they remain competitive and grow their book is by tracking renewals automatically in order to contact customers at the right time, every time. Increasing your customer retention rate takes little extra work with the right tools in place — automatic alerting helps make it simple to streamline the renewal process.

A manual renewal process can take upwards of 10 minutes — and while this number in itself isn't especially daunting, the sheer volume of renewals can make this a time-consuming process that ultimately is prone to mistakes and the loss of customers. Having an automatic process in place can ensure the agency is able to reach out to customers ahead of renewals, provide an exceptional customer service, and earn the renewed business.

“For renewals, the system auto-fills previously entered data. This feature alone has enabled us to cut the time it takes to complete a renewal from an average of 10 minutes to about three minutes.”

*Jorge Gonzalez, Vice President, Marsh Saldana, Inc.,
San Juan, Puerto Rico*

“When it's time for a renewal, we go to the declarations page on the policy and email this review directly to the customer. It shows property value, liability and a list of all certificates, as well as a detail of where we've saved them money.”

Don Taylor, President, Bennion Taylor Insurance

Identify New Business Opportunities with Prospects & Existing Customers.

Win New Business with Streamlined Marketing

Independent agents who are looking to remain competitive and expand their book know the importance of identifying and winning new business among their existing clients — by cross-selling and rounding out accounts — as well as by being prepared for prospects who walk in the door. To support both of these, it's important to have tools in place that allow for streamlined marketing and campaign activities, which help to easily generate new leads and opportunities.

The systems that support new pipeline activity and closing new business faster are ones that enable paperless, seamless processes and allow staff to focus more on providing an excellent customer service experience. Having the right system in place can lay the groundwork for future growth and expansion.



“The world was going paperless and our office still used manual telephone logs to keep track of our customer and prospect interactions—all signed, dated and placed in customer files. We knew we needed an agency management system..”

Don Taylor, President, Bennion Taylor Insurance

Connect with Customers via Personalized Communication.

Adapt to Customer Expectations

Consumers have become “rewired” mentally and emotionally to their smartphones and tablets, causing them to increasingly abandon traditional communication channels in favor of digital communications, such as texting — both in their personal and business lives.

In fact, texting is the highest rated contact method for customer satisfaction, compared to all other communication channels. According to a Harris poll, 64% of consumers are likely to have a positive perception of a company that offers texting as a service channel.

In today’s world, most agencies have customers who expect to communicate via text message. However, most agency management systems do not support text messaging, resulting in cumbersome workarounds that decrease employee productivity and leads to a slower customer service experience for customers. Without the right tools in place to communicate with customers via text messaging, CSRs end up using their personal cell phones to text with insureds, then take a screenshot of the text conversation, and send that image to their work email. Once the text conversation is in their email, the message can be attached to the

“ We knew that if we wanted to grow, we would have to invest in a management system that gave us more capacity, and would help us service our customers more efficiently. We live in a world of texts and instant messaging. Our clients expect that same type of immediacy from us. ”

Don Taylor, President, Bennion Taylor Insurance

agency management system for E&O purposes — a step that often doesn’t happen, leaving the agency open to E&O risk that could cost hundreds or thousands of dollars, and ultimately shut down the business.

To prepare for future success, it’s important for independent agencies to ensure they have the tools in place that streamline communication, have a consistent and repeatable process, and reduce the risk of exposure in order to service customers more efficiently. And connecting with customers the way they want will help agencies stand out from the crowd, allowing them to remain competitive and be prepared for future growth.



Lay the Groundwork for Your Future, Now

Future success comes from laying a strong foundation that enables growth, expansion, and customer service. With the right set of tools in place, your agency can streamline internal processes, identify new business, and retain and communicate with customers. But not all agencies have the right systems to support their future.

Have you prepared the foundation for your future?

AMS360 is the foundational management solution for your core business functions. It provides integrated tools that help automate manual processes, retain existing customers, and enable seamless connections with customers, so agencies can provide superior customer service and prepare for the future.

To learn more about the tools that can help you set the foundation for your future, read the Data Sheet.

Read Now

Ready to take the next step?
Contact Us or call 800.444.4813.



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