



The right tasks to the right people at the right time.

WorkSmart® is the leading insurance-specific workflow and content management solution designed specifically for the insurance industry. WorkSmart helps get your work under control by aligning all your agency's resources so you can deliver exceptional customer service while increasing profitability.

Features you need

- **Built for insurance, by insurance:** Insurance focused document management provides full editing and routing history for client and policy files, so you save time and increase accuracy.
- **Improved processes, decreased costs:** Ensure that the right work is routed to the right person, at the right time – so your staff can spend less time searching and more time selling.
- **Know What Work Is On The Floor:** Real-time insights help you balance workloads, identify overdue work, and determine when to hire.
- **Access anywhere, anytime:** Provide your staff with remote access to policy-related content while in the field, so they can focus on customer service.

Some customers have seen potential for

25% increased capacity for policy services

Save 20-25 minutes on searches per employee per day

Save account representatives **1 hour per day**

18% increase in revenue per employee

33% reduction in time to turn a policy

"WorkSmart allows us to be proactive, to look at workflow bottlenecks, and see where we're potentially losing money or have risk. No other system we looked at had this."

Debbie Buckner, Manager of Operations, CHS Insurance

Contact Us

or call 800.444.4813