



Wright Insurance Agency, Inc.

Company snapshot

Wright Insurance Agency, Inc. is a full-service agency located in Kewaskum, Wisconsin, about 40 miles northwest of Milwaukee. Since its founding in 1984, Wright Insurance Agency has differentiated itself by always providing exceptional service and striving to find the best coverage at the most competitive rates for its clients.

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Jim Wright,
Owner, Wright Insurance Agency

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Vertafore® Solutions:

PL Rating

Proven results:

- Migrated in less than one week, without downtime
- Driver and vehicle data pre-fill reduces quote time by 50%
- Consumer-facing rating opens new market opportunity
- Gains many more features compared to other comparative rating applications

For the Wright Insurance Agency, migrating from MI-Rater RT to PL Rating was like getting a "free upgrade".

The Wright Insurance Agency isn't the biggest agency around, but you'd be hard-pressed to find one that works harder. This Wisconsin-based, two-person firm brings a whole new meaning to the words "customer service."

"We work hard to find our existing clients better coverage at reduced rates—instead of just re-upping renewals. That totally separates our agency, particularly in this economy," said Jim Wright, owner of Wright Insurance Agency, who also handles personal lines for the company.

"It's so simple and intuitive that I was able to pick it up right away."

To maintain this service level without a massive staff, Wright relies heavily on technology—particularly comparative rating. Years ago, he spent a lot of time and effort researching just about every rater on the market. Back then, he decided on FSC's MI-Rater RT, which integrated with his agency management system. When Vertafore acquired FSC in 2011, Wright received the news that he'd be migrating to Vertafore's PL Rating. Although he liked MI-Rater RT, he believed this was a positive change.

"I knew that Vertafore was a good company with outstanding products, but I was still amazed when I learned all the features PL Rating brought to the table," he said. "I felt like I was getting a free upgrade."

A Flawless Migration

Of course, having a great solution is one thing. Migrating to it, without disrupting business, is quite another. According to Wright, the Vertafore team came through with flying colors.

"The people at Vertafore were tremendous from day one," Wright said. "The migration was no problem. I stayed on MI-Rater RT right up until our go-live with PL Rating, because I had some outstanding quotes on the old system. The whole migration took a week or less, and I was able to continue handling business as usual."

The integration with Wright's core solution also went off without so much as a hiccup.

"Integration with the agency management system is essential to my business, because of all the rekeying it saves on remarkets—and that went perfectly as well," Wright said.

Although Vertafore provided training, Wright didn't require much help.

"PL Rating takes very little effort to learn. It's so simple and intuitive that I was able to pick it up right away," he said.

A Superior Solution

Ease of use is only part of the story. According to Wright, PL Rating delivers significantly more features than he had before—all of which help him save time and grow his business.

"I especially like the Solutions at Quote feature, which pulls in date of birth, vehicle VIN number, and other information automatically," Wright said. "Before, I'd have to ask my client for their social security number and keep them on the phone asking for the additional information PL Rating can now pull in instantly. I can remarket the account to find my customers better deals on the coverage and cost, without irritating them by wasting their time on the phone."

"If you're not there with the latest technology, you will be left behind, PL Rating keeps us ahead of the game."

Jim Wright,

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Wright also appreciates how efficiently PL Rating facilitates the quoting process.

"Other platforms go out on a quote and come back with requests for additional information for company X or company Y. PL Rating is once and done. It gets all of the necessary information up front, and then displays all the quotes in real time," Wright said. "Eliminating that back-and-forth has cut my quoting time in half."

He also got something he didn't expect with PL Rating—the ability to offer consumer-facing quoting directly on his website with Consumer Rate Quotes.

"Eliminating that back-and-forth has cut my quoting time in half."

"Speed and efficiency are the benchmarks of my operation. PL Rating gives me both," *Wright said.* "Without a doubt, PL Rating is one of the best technological advances I've made in a long time. It's a great product, with a great company behind it."

Jim Wright,
Owner, Wright Insurance Agency



"Consumer Rate Quotes is the coolest thing I've seen," Wright said. "Consumers can go to my website and get multiple real-time quotes, not just enter a form and wait for a call back, on a no-obligation basis. I get notified on activity immediately, so I can follow up with those prospects."

Wright's commercial lines account representative, who has an office in another location, can also access PL Rating remotely to get a personal lines quote for any of his clients who might have both business and personal insurance needs.

Having this feature gives the agency a clear competitive advantage.

"If you're not ready with the self-service tools that let prospective clients shop for insurance the way they want to shop; if you're not there with the latest technology, you will be left behind," Wright said. "PL Rating keeps us ahead of the game."

It also helps a two-person agency operate with the same turnarounds as the big guys.

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