

PROCESSES, COMMUNICATION, AND TECHNOLOGY

# Power better agency management with

 **AgencyOne**

 **Vertafore**



# Chapter 1: Introduction

## The why

Independent insurance agencies face mounting pressure to improve efficiency, streamline workflows, and deliver exceptional client service. According to the **Agency Universe Study** by the Big “I,” **more than half** of agencies are searching for operational efficiencies to better serve their clients.

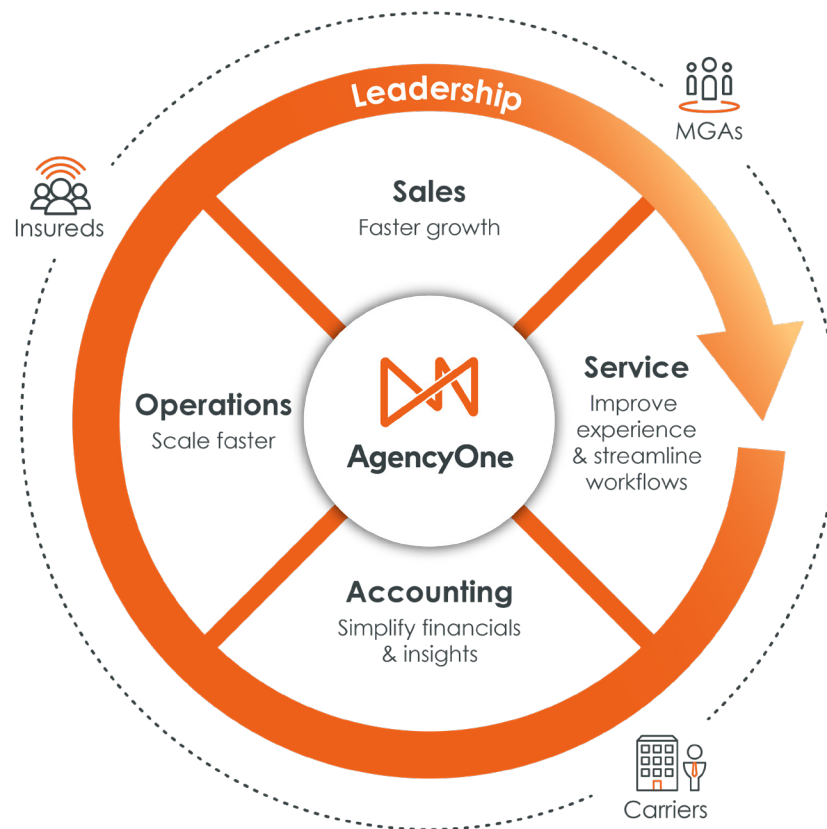
## What is AgencyOne

Vertafore built AgencyOne® to unify people, processes, and technology. By streamlining operations, automating routine tasks, and integrating workflows, AgencyOne empowers agencies to optimize their day-to-day operations.

## Purpose of the eBook

- Explore the most pressing challenges agencies face today.
- Introduce AgencyOne as the solution to streamline agency management.
- Highlight the benefits that AgencyOne delivers to empower your agency.





“

Over the last year, I've had the honor to work with agents throughout the country to hear firsthand about their passion for their work and see how they engage with their technology. In partnership with our customers, we've identified both quick wins and bigger investments that we'll tackle with Project Impact. By driving real change, we're modernizing solutions to support the real heroes at the center of every agency's success.

- Vijay Muniswamy, Sr. Director of Product Management, Vertafore

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# Chapter 2: The challenges

## Operational inefficiencies cause challenges in agency management

### Key challenges:

- **Lack of operating efficiencies:** More than half of agencies seek improved workflows to better serve their clients. Inefficient manual processes slow teams down and reduce productivity.
- **Cumbersome workflows:** Many agencies struggle with “noise” in workflows, where too many clicks, redundant steps, and fragmented processes hinder productivity.
- **Inconsistent information management:** Siloed systems and manual processes often result in errors, increased omissions exposure, and inefficient data access.
- **Financial complexity:** Commission reconciliation, invoicing, and billing remain tedious and error-prone, further straining back-office teams.

Up to 2 hours of savings  
per day per account manager\*



*\*Time savings expected from Project Impact quick wins and bigger investments*

# Impact on agencies

1

Agencies lose valuable time on redundant tasks, limiting capacity for growth.

2

Service teams face frustration from workflows filled with unnecessary steps and data-entry burdens.

3

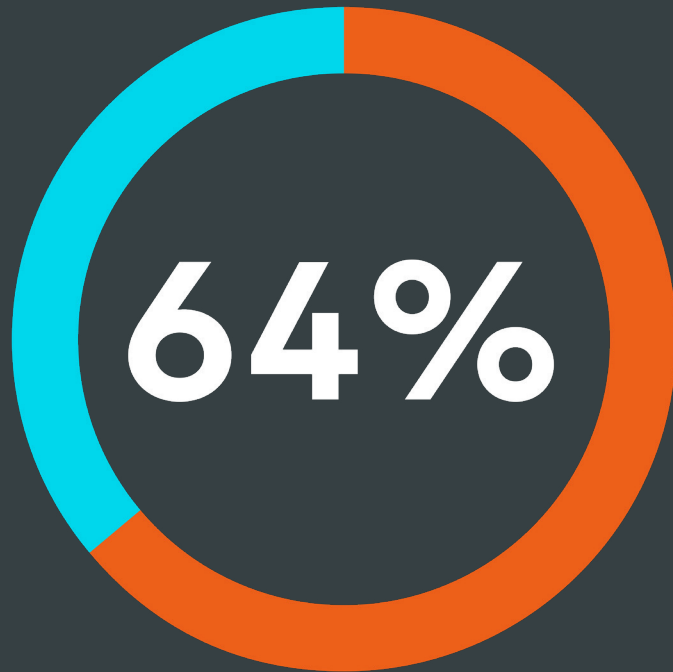
Errors in manual processes can lead to financial and operational setbacks.

4

Inconsistencies in documentation and mismanagement of data can lead to E&O exposure, which leads to both financial and reputational damage.



**64% of agencies fail to maximize their tech stack.\***



Agencies typically juggle **11 disconnected technologies**, causing inefficiencies.



\* Catalyit, The State of Tech in Independent Agencies, April 2023



# Chapter 3: The solution

## AgencyOne: Best-of-breed technology in one integrated platform

### Solution Overview:

- AgencyOne integrates people, processes, and technology to transform the way agencies operate. No matter what you are doing—**new business, service requests, or renewal processing**. AgencyOne streamlines every step from start to finish across all products.



### AgencyOne addresses key challenges:

#### 1. Streamlines operations (*addressing workflow inefficiencies*):

- Align the right work with the **right person at the right time**.
- Simplify client handoffs across the entire **policy lifecycle**—from quoting to servicing to renewals.
- Reduce “noise” in workflows by minimizing clicks, streamlining processes, and enabling quick actions.
- Eliminate duplicate entry with **automatic data flow**, ensuring seamless movement of information between systems.
- Save time on daily tasks through **automation**, allowing teams to focus on higher value activities.

#### 2. Workflow optimization (*simplifying complex, time-consuming processes*):

- Reduce the time spent on **routine and repetitive tasks** through improved workflows.
- **Smart prefill** and **enhanced download features** reduce manual data entry.
- **Third-party data prefill** options auto-populate critical information, eliminating redundant manual inputs.

With Project Impact, Vertafore identified bottlenecks by shadowing over **115 account managers**, leading to smarter, faster workflows.

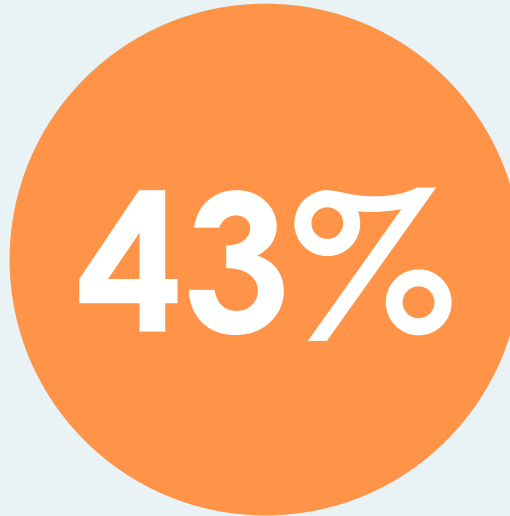




## The benefits of AgencyOne and Project Impact



**Save valuable time  
per employee**



**faster navigation\***



**faster searches\***

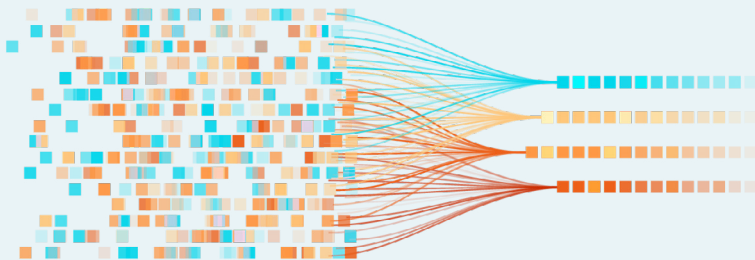
Per product-led performance testing conducted in November 2024 and based off an average of 3 products.\*

### 3. Enhanced information management (addressing data inconsistencies):

- Integrate your systems to ensure a single, reliable source of truth for your data.
- Intuitive file structures and document routing mean your teams can find the information they need when they need it, reducing errors and omissions risks.



### Results:



Eliminate manual double entry and ensure **data flows seamlessly** across systems.



**Reduce errors** caused by siloed or inaccurate information.

#### 4. Simplified financial management (addressing financial complexity):

- AgencyOne automates billing, invoicing, and commission reconciliation to simplify your financial workflows.
- Commission splits are auto-calculated and shown in statements, ensuring producers are paid accurately and on time.
- General ledger functionality streamlines month-end processes, ensuring compliance and accurate financial records.

#### Results:



**Eliminate manual reconciliation, reducing tedious tasks and errors.**



**Empower accounting teams to manage finances seamlessly and efficiently.**





# Chapter 4: Conclusion and wrap-up

## Recap the transformation

AgencyOne directly addresses the challenges agencies face —**manual inefficiencies, inconsistent information management, and financial complexity**—while delivering significant time and cost savings.



## The benefits of AgencyOne:



Up to **2 hours saved per day** per account manager.

**33%**

**increased capacity** for policy services.

**43%**

**faster navigation** and **19% faster searches**.\*



Save up to **2 weeks per year per employee** through automation.

Per product-led performance testing conducted in November 2024 and based off an average of 3 products.\*



Learn how AgencyOne can transform your agency.

Contact us today for a demo or consultation.

[Learn more](#)



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