

How 3 brokerages future-proofed their businesses



Many independent insurance agencies are already using data for things like

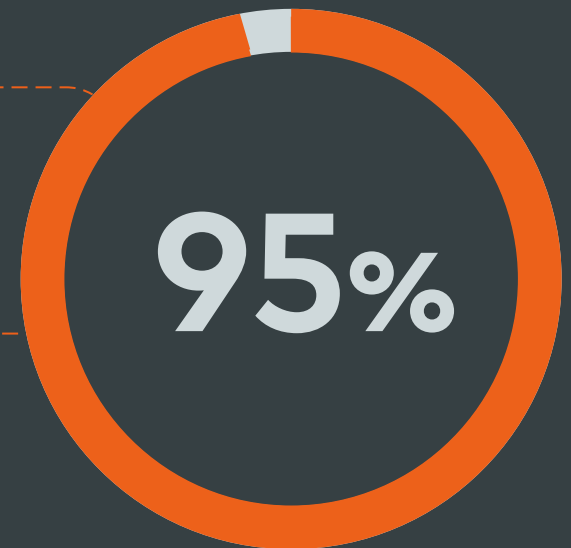


But data and analytics encompass so much more than that!

According to Deloitte, 95% of brokerages are either working on digital transformation in business or planning on it.¹

Vertafore Canada's SaaS platform makes being modern easier by providing Canadian brokers the best digital solutions tailored for their unique needs.

¹ Deloitte, 2021 Insurance Outlook



Don't just take it from us. See how Vertafore Canada's SaaS platform is helping brokerages like yours:

BROKERAGE A: David is a manager without access to business insights.



As a result, he faces these challenges:

- David cannot accurately evaluate his team's productivity or their goals
- David doesn't understand where to target his efforts or how to evaluate how his brokerage performs.



THE SOLUTION: SIG & MyBrokerHome.

- With MyBrokerHome's Manager Dashboard, David has visibility into his producers' workflows to measure their successes as well as their struggles and identify bottlenecks in their work.
- Comprehensive management reports in SIG allow David access to automated reports built to provide data that measures his brokerage's performance.



BROKERAGE B: Sarah is a producer without the resources to provide her clients with the best possible digital service.

As a result, she faces these challenges:

- Without online capabilities, Sarah's customers don't have 24/7 access to policy information.
- Sarah lacks visibility into the total value & exposure of her clients' connected relationships across accounts, resulting in inferior customer service for her clients.
- Time-consuming manual side-by-side coverage comparisons risk E&O exposure.



THE SOLUTION:

InsurLink Canada, eSIGN, Renewal Compare, & SIG's Portfolio View

- With InsurLink Canada, Sarah's clients can access their policy information on their own time, even when the office is closed.
- eSIGN allows Sarah to send documents needing her clients' signatures directly from SIG. She no longer needs to excessively follow up with her clients because the solution does it for her.
- All these digital solutions help Sarah provide her clients with the best possible service

BROKERAGE C: Leslie, a customer service representative, lacks the resources to provide secure payment and billing methods.



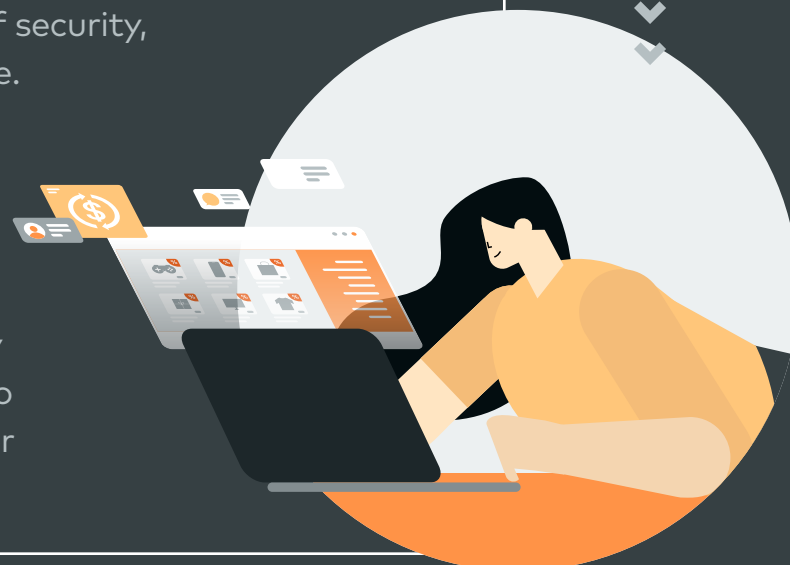
As a result,
she faces these challenges:

- Leslie must deal with insecure payment & billing methods.
- Leslie manually bills every policy, which is time-consuming, expensive, and inconvenient.
- She risks letting incorrect information slip with an inefficient auto-billing process.

THE SOLUTION:

Cloud, automatic billing, ePay, & AcordPay integrations

- Cloud allows Leslie to implement the highest standards of security, so she knows her billing and payment interactions are safe.
- Automatic billing allows Leslie the choice of which carrier transaction to automatically bill. This also allows Leslie to evaluate renewals proactively rather than reactively.
- The Vertafore Canada SaaS integrations with ePay and AcordPay lets Leslie's customers pay their invoices directly from the broker management system. This allows Leslie to ditch manual data entry and automate both the customer payment and cash receipt process.



Canadian broker needs are unique and thus require uniquely Canadian solutions. With Vertafore Canada's SaaS platform, brokers can gain business insights to improve employee productivity, provide an excellent client digital experience, and manage interactions without worrying about E&O exposure.



Interested in learning more about how modern InsurTech solutions can help your Canadian business stay future-ready?

SEE HOW





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