
5 ways brokers deliver enhanced digital experiences

AS A BROKERAGE IN THIS MODERN WORLD, rolling with the increased use of digital capabilities is key to your success. Unpredictability within the insurance industry provides your brokerage with new opportunities to do things as you've never done them before, especially as client and staff expectations evolve with the rise of technology. Going digital allows your clients 24/7 access to information and enables your staff to spend more time fostering client relationships and generating revenue and leads.

Are you providing the best experience for your clients and staff in this digital age? How do you get started?

We've got a few ways to help you deliver an enhanced digital experience in your brokerage. →

1

Provide electronic signature capabilities

This may seem like a small way to get started, but it can go a long way. In a world where clients do almost everything online, adding this convenience will help your brokerage provide a better client experience.

Electronic signature capabilities allow customer quotes to be signed, returned, and delivered more quickly, freeing up staff time to devote time to revenue-generating activities and other customer interactions.

Especially when face-to-face interactions aren't possible, providing e-signature capabilities is a game-changer, for both your brokerage and your clients.





Kate Athmer,

Senior Director of Growth Marketing and Sales Development

My insurance agent just told me there's no way for me to electronically sign my paperwork. Who has a car/renter's insurance provider they'd recommend that's capable of operating like it's 2020?

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Text messages can yield up to 295% more responses than traditional methods of communication

2

Communicate via text messaging

According to Vox Media, **people check their phones 58 times a day on average**. Each of those times is an opportunity for your brokerage to reach them, especially because **91% of users who opt in to texts from a brand or company rate the texts as useful**.

The results can be astounding. Most younger age groups respond well to text communications. In fact, text messages can yield up to 295% more responses than traditional methods of long- or

short-form communication. Meeting your clients where they are, and where they are comfortable, will increase communication quality, client satisfaction and — ultimately — retention rates.

Additionally, having the ability to text your clients with brokerage management system (BMS) integration will help streamline processes in your brokerage.

3

Provide document sharing

Easy electronic document sharing is the perfect way to reduce clutter and increase organization in your brokerage. Although it is incredibly important to reduce unnecessary waste, document sharing is about more than just saving paper.

A secure document sharing tool protects against errors & omissions exposure, as data encryption keeps documents safe. Put your brokerage and clients at ease with the knowledge that documents are not at risk.



4

Enable your staff to work remotely

Remote access may be necessary in unexpected circumstances and it's important for your brokerage to be prepared as part of your business continuity plan.

When your staff needs to work outside the office, having remote access to your brokerage's online BMS and phone system is vital. Staff will maintain a steady workflow and know how to handle

business while working away from the office, allowing them to focus on client relationships and revenue-producing activities. Clients are cared for, no matter where your staff is.

5

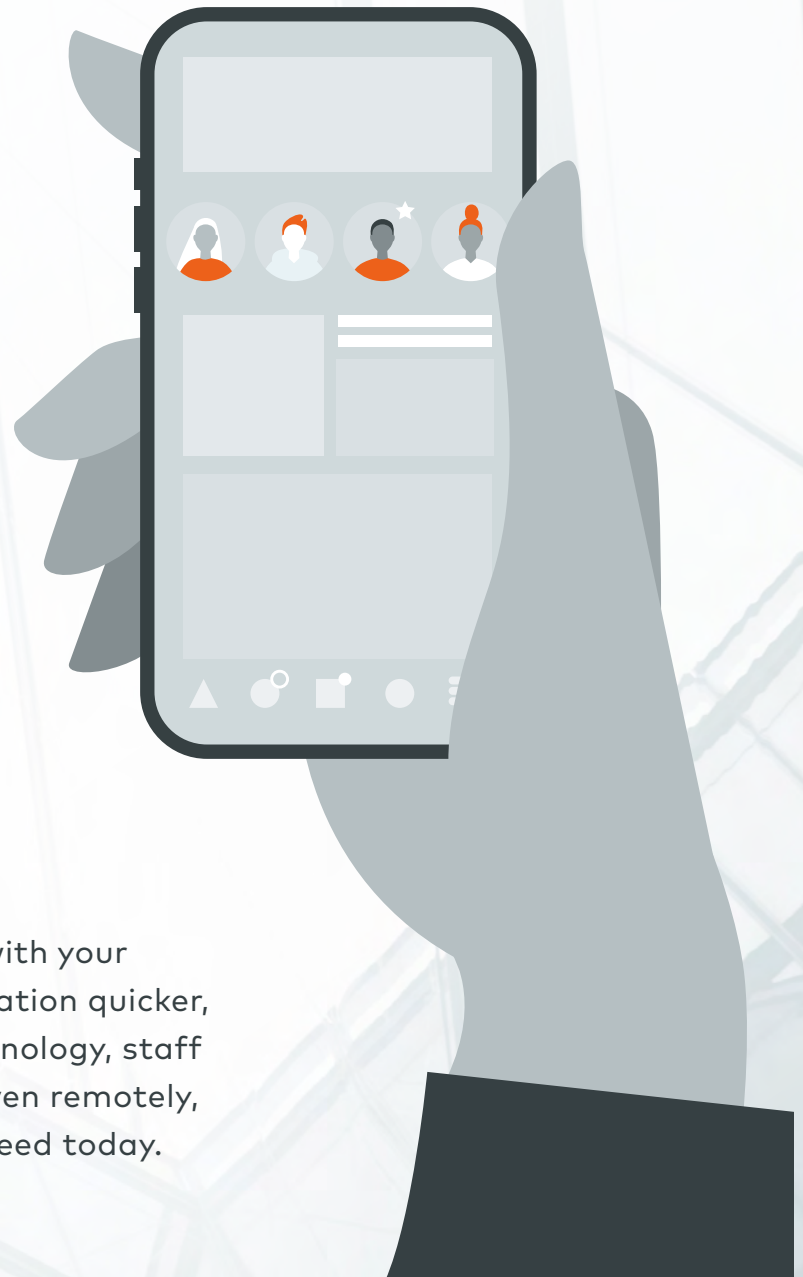
Have a client portal

Providing a client portal or application can change everything for brokerages. It's an all-in-one tool that can save your brokerage from headaches and provide your people with time-saving processes and capabilities.

Implementing a client portal allows you to do all of the above, including 24/7 communication with customers, even when you're not in the office. You can relax knowing your customers are taken care of. Client portals also provide concurrent information for your brokerage, and help with updating important items in real-time, like certificates.

This capability should also be mobile for convenient use. Offering intuitive 24/7 access to account information through a client portal allows clients the ability to update certificate holders, check claims statuses, and keep and display auto ID cards — all on their phones. Your clients will be able to access information anywhere — from the comfort of their couch or from the scene of an accident.

Additionally, having a client portal that integrates with your BMS allows you to streamline processes and information quicker, more efficiently, and with less hassle. With this technology, staff are able to access digital tools and service clients even remotely, which is becoming more and more of an imminent need today.

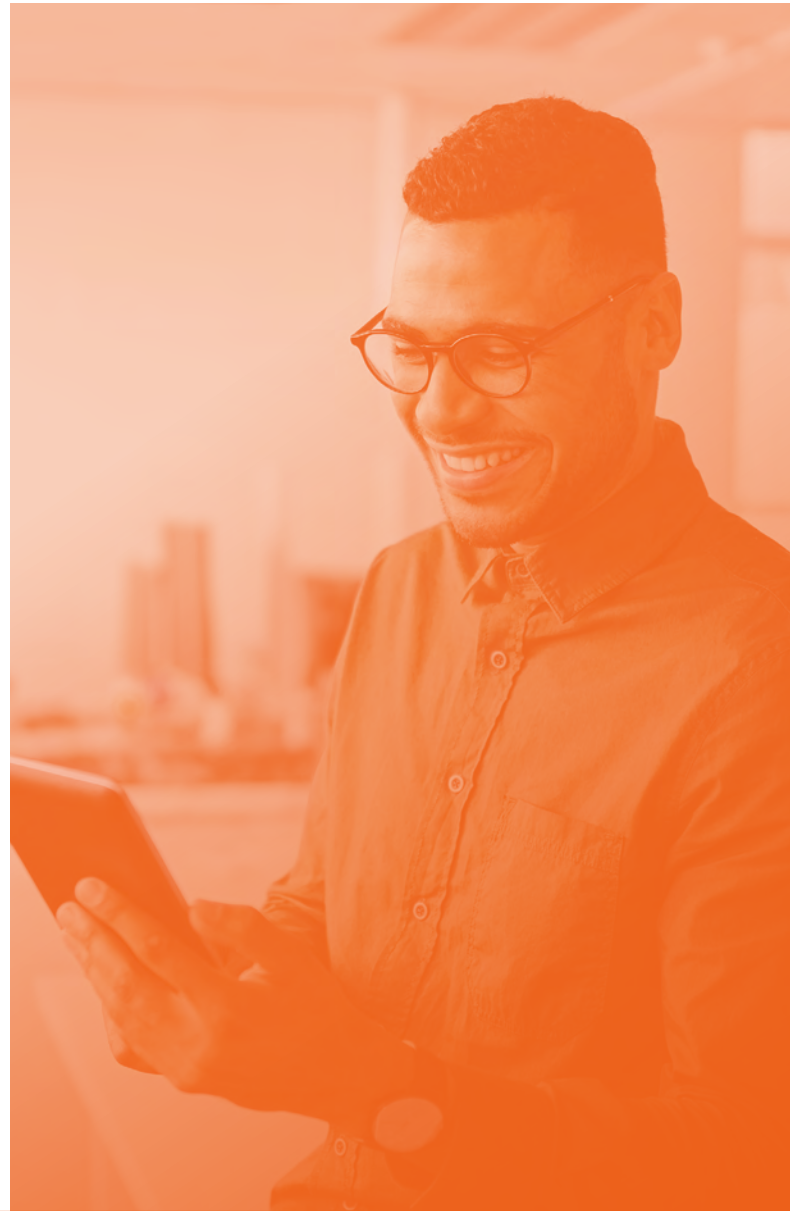


Positive results

The world is taking advantage of digital abilities — and your brokerage can, too. With the increased capability to go mobile and have electronic access to information in almost all other areas of life, your clients and staff expect the same service from you.

Using the five steps above will help your brokerage become a more digital and modern place to do business. Your staff will have more time to spend on fostering client relationships, you'll increase your ability to anticipate your clients' and staff's expectations and become a nimbler brokerage in an ever-changing industry — all the while growing your profitability.

Implementing capabilities that allow you to look out for all parties under your umbrella is vital, even when the change that comes with it can be daunting. Looking toward the future will help your brokerage provide an enhanced digital experience for clients and staff today.



[Read our success story](#) to see how Twin Lakes Insurance Agency created a winning digital experience.



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