



Reliable Insurance Agency

Company snapshot

Reliable Insurance Agency started out 40 years ago as a family business providing insurance and financial expertise to the folks of the Duluth/Superior area in Minnesota. Their track record has shown that their promise of "True to Our Name" isn't just words. Today, Reliable has three offices and is on the fast track to be the premier independent insurance agency in Northern Minnesota. Reliable Insurance Agency has recently started working with a major carrier — submitting quotes, underwriting policies, and more! Then, in the midst of this exciting time, Reliable was asked to participate in book rolls by their new partner, and that's where we come in.

"If you have a couple carriers that are pretty close in premium, then the ease of doing business and our relationship with the carriers plays a major role in where we are going to place that business."

Kyle Wojtysiak,
Senior Accounting Manager,
Reliable Insurance Agency

Reliable Insurance Agency

Vertafore solutions

Book Roll™

Proven results

- Improved carrier relationship
- Fully automated process
- Increase in effective, targeted communication
- Decrease in unsecure and ineffective data transfer

Reliable Insurance Agency is a direct beneficiary of the improved relationships and process that Book Roll provides.

A carrier that cares

Reliable Insurance Agency has been conducting regular book rolls with their carrier partner since October 2018. About halfway through the year, this carrier made the decision to improve their relationship with Reliable by adding Vertafore's Book Roll software to their existing book roll process. This decision was made with the goal of improving the relationship between Reliable and themselves, and as Kyle Wojtysiak has let us know — it worked!

"We actually had a taste of both steps — we would run the reports and try to get all that data and then have to email it over to our carrier, versus having Book Roll do that work. Obviously those steps were much more cumbersome than the new tool offers."

Improving the process & therefore the relationship

Kyle Wojtysiak of Reliable is the man behind a lot of their reporting and is currently a senior accounting manager. He was also in charge of managing the roll out of the new book roll process when their carrier partner decided that they needed his agency's data on a monthly basis. Their manual book roll process wasn't quite as bad as others, but it still required a significant time commitment from vital agency personnel, was insecure, and created potential friction between both parties. Kyle informed us he was regularly spending time manually collecting and then sending their highly confidential policy data through email. This process was time consuming and put them one wrong click away from an expensive data leak.

With the new process, Reliable can simply select the policies and instantly and securely export them via Book Roll. Kyle explained where he has benefitted, and why they're even happier with their carrier partner after switching to Book Roll. He has time back in his day for his regular job, no longer participates in a potentially disastrous data transfer, and his carrier obtains the policy information they want, moments after the request comes through.

"It saves those steps where you had to go in and actually upload each policy individually... I would say for me, it's the ease of going in and searching for that data for that time period or that the company is requesting you to send over. That is where the big benefit comes."

Being a carrier of choice

Kyle has high praise for his carrier partner, and the switch has made their relationship even stronger. Saving time is incredibly valuable for Kyle as he wears quite a few hats at Reliable Insurance. Kyle also let us know that Book Roll certainly makes it easier for folks without his skill set to perform a book roll, and the time it saves him allows him to focus on vital work. All of this affects Reliable's decision when choosing carrier partners to work with.

"If you have a couple carriers that are pretty close in premium, the ease of doing business, our relationship with the carriers, plays a major role in where we are going to place that business."

Agencies like Reliable Insurance are the lifeblood of the industry, and improving the connectivity and relationship with these agencies is of utmost importance for carriers. Agency relationships can be defined by a weak-link process such as manual book rolls, but they don't have to be!

With Book Roll, carriers can digitally request an agency's book of business, without disrupting their operations. Whether they're focused on growing personal or commercial lines, Book Roll simplifies the process of evaluating new or existing business. Whether carriers realize it or not, every agency interaction matters and affects who is choosing to write business with them. Book Roll provides a mechanism to facilitate better interactions and improve that relationship.

**Start improving your
agency partnerships with
Book Roll today.**

Contact Vertafore



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