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# Twin Lakes Insurance Agency

## Company snapshot

Established in 1983, Twin Lakes Insurance Agency began as a four-person firm providing life insurance to the Greater Kansas City area. They've since expanded into the largest independent insurance agency in Lee's Summit, Missouri. From their start as a life insurance company, Twin Lakes Insurance has grown to offer personal, commercial, life insurance, and everything in between. In 2011, this family-owned agency was ranked one of the top 25 independent insurance agencies by the Kansas City Business Journal. One key to their success: Twin Lakes operates with the core belief that the customer comes first and prides themselves on providing superior value and personalized service with a hometown touch.

“InsurLink supports our hometown feel, where we're family. We're here when you need us, even when we're not in the office.”

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**Deanna Carver**

Operations Manager,  
Twin Lakes Insurance Agency

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## Vertafore Solutions:

InsurLink

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### Proven results:

- Saved 20 hours per week on the certificate process
- Provided customers 24/7 access to policies and information for self-service
- Enhanced the customer experience and improved the client-agency relationship

Twin Lakes is nearly 40 years old, but they are constantly looking for innovative ways to provide the best service possible to their customers.

A lot has changed since Deanna Carver — receptionist turned Operations Manager — joined the company 21 years ago. One of the most notable changes has been the technology they use. "Don't let technology make you think you're going to get away from your customers," Carver says, "it helps you stay in touch with your customer."

InsurLink fit perfectly into Twin Lakes' business strategy. The solution gives customers access to their policies and documents whenever they need it — which is not only a huge plus for the customer, but a massive productivity gain for the agency.

### Self-service in a 24/7 environment

Today's consumers expect 24/7 service and InsurLink has enabled Twin Lakes to provide just that. Giving customers a personalized digital experience keeps them ahead of the competition while preserving the relationship focus that got them where they are today. In Carver's words, "InsurLink supports our hometown feel, where we're family. We're here when you need us, even when we're not in the office."

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**Deanna Carver**

*Operations Manager,  
Twin Lakes Insurance Agency*

Twin Lakes has a large book of contractors who work non-traditional hours and require certificates outside of the standard nine-to-five. For them, not being able to access a certificate could mean lost business. With InsurLink, however, Twin Lakes' contractors can easily retrieve their certificates without a single phone call, whenever they need them. They simply log onto the portal and have immediate access to all their policy information and certificates so they can get the job done.

Carver estimates that each of her producers used to spend at least an hour per day on just two certificates. With 20 producers on the team, InsurLink has saved Twin Lakes 20 hours a week just by automating the certificate process.



# Workflow without InsurLink

Twin Lakes manually issued certificates to their customers



**1**

The customer emailed or called Twin Lakes during business hours



**2**

The CSR asked for the customer's address and additional information



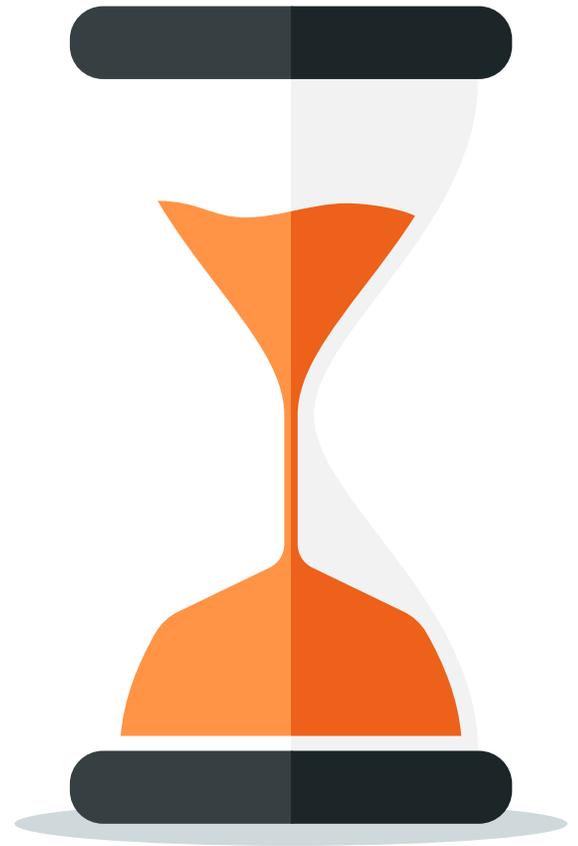
**3**

The CSR entered the information into the management system



**4**

The CSR sent a copy to the insurer before sending to the client



**TOTAL TIME: 30 MINUTES**

# Workflow with InsurLink

Twin Lakes lets their customers serve themselves at their convenience



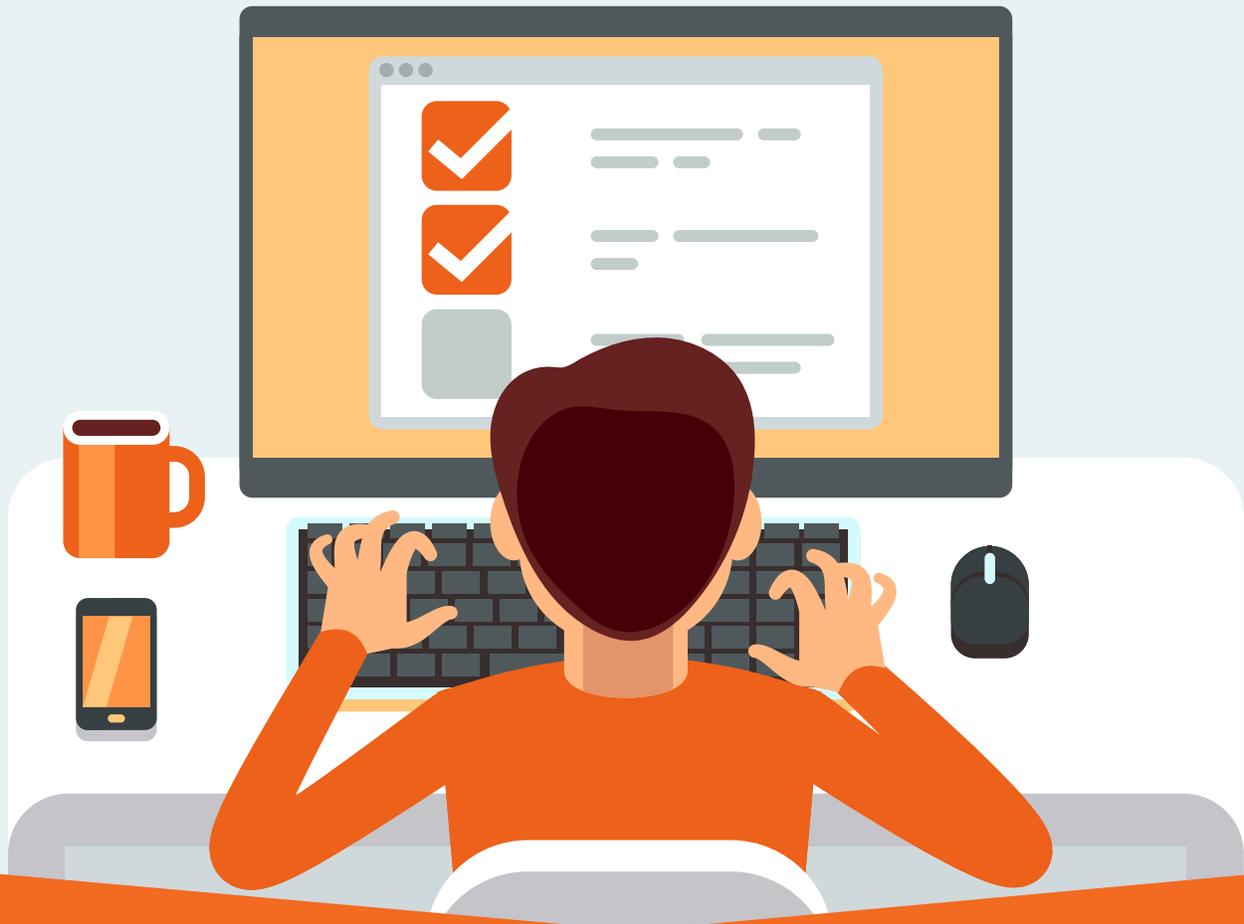
**1**

The customer accesses InsurLink without contacting Twin Lakes



**2**

With access to all their policies and information, the customer can quickly retrieve their certificate

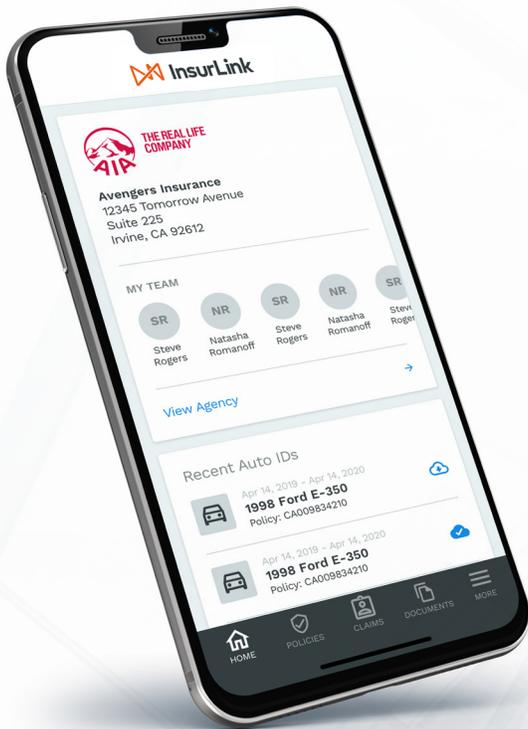


**TOTAL TIME: 3 MINUTES**

“We’re already making that initial call, we just add InsurLink to it. That alone often alleviates half of our certificate calls.”

But InsurLink does much more than streamline the certificate process for Twin Lakes’ contracting customers. Every client can take advantage of the 24/7 self-service capabilities the portal has to offer. Whether they need access to their auto ID card or are just curious about their policy information, InsurLink makes every interaction with Twin Lakes simple.

Plus, it takes no additional time for Twin Lakes’ CSRs to get customers acquainted with the portal. They simply add it to the introduction call and email they send to all new customers. Now, along with a message introducing the new customer to their account manager, they include a link to InsurLink. Carver adds, “We’re already making that initial call, we just add InsurLink to it. That alone often alleviates half of our certificate calls.”



## The future is mobile

InsurLink also comes with a mobile app. With consumers increasingly preferring mobile experiences over websites, Carver believes the app gives Twin Lakes an even better leg up on the competition.

"The app is something the other independent agencies might not have," she explains, "the direct writers are advertising and saying they have apps — now we can say we do too."

The app makes accessing certificates, policy information, and ID cards even easier for Twin Lakes' customers — and their staff too, in unexpected ways! It came in handy when Twin Lakes COO, Tyler Smith, was pulled over and discovered he didn't have his auto ID card on hand. Luckily, he had downloaded InsurLink a few weeks prior to test it out for his customers. Carver said that Smith simply pulled his auto ID card up on the app and was soon on his way.



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The InsurLink app enables your customers to conveniently and quickly access their information and submit requests from their mobile device. The app even allows for auto ID card downloads, ensuring your customers have access to the information they need even without cellular service.

## A partner that listens

Twin Lakes is far from done in their mission to adopt technology to better serve their customers. So, Carver is glad that they partnered with a software vendor that listens to their needs and makes improvements that help them achieve their goals. "The updates are always positive," she says, "Vertafore is listening to what the agents need. The more I work with Vertafore, the better I feel about them understanding my world."

## Service customers on their schedule

InsurLink gives your customers access to their policies and documents whenever they need it. With a branded insurance customer portal available on any device, your customers can have the self-service they want outside of business hours while you keep track of every interaction.

### InsurLink offers:

- 24-hour access so your clients can perform self-service tasks and securely share files with you – when, where, and how it's convenient for them
- The InsurLink mobile app so your customers can interact with your agency whether they are at home, in the office, or on the go
- Customizable features to reflect your unique branding
- Electronic transaction tracking to reduce your exposure to E&O risks



Meet your customers where they are.

Learn more

or call us at [800.444.4813](tel:800.444.4813).





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