

The right work, to the right people, at the right time

Get more done with WorkSmart! The leading enterprise content management solution—designed specifically for insurance professionals. File-based document management and task-based workflows, including Big “i” best practice workflows, align work with the right person at the right time.

WorkSmart benefits

Available anytime, anywhere

- Collaborate on workflows remotely - from home, the office, or in the field
- Service customers quickly with policy and claim information at your fingertips

Reduce clicks and streamline workflows

- Modern, user-friendly interface
- Integrate directly with AMS360, Sagitta and BenefitPoint
- Advanced automated workflows

Built for insurance professionals, by insurance professionals

- File-centric document management
- Big “i” best-practice workflows built in
- Insurance focused roadmap
- Easily navigated, real-time tracking, and streamlined workflows

Protection that follows content anywhere

- Vertafore Single Sign-on (VSSO) – one password across all Vertafore products
- PingIdentity® Multi-Factor Authentication (MFA) – strong user authentication
- Centralized console and streamlined deployment
- Advanced permission controls
- Robust APIs so you can integrate additional business critical tools
- Automatic version upgrades and enhancements keep you current, compliant, and secure

WorkSmart helps your team get more done every day, giving you the security and flexibility, you need to serve your entire workforce – from home to office and anywhere in between.

WorkSmart customers have seen

33% increased capacity for policy services

1.5 hours less on searches per employee per day

18% increase in revenue per employee

33% reduction in time to turn a policy

“WorkSmart allows us to be proactive, to look at workflow bottlenecks, and see where we’re potentially losing money or have risk. No other system we looked at had this.”

Debbie Buckner,
Manager of Operations, *CHS Insurance*

“Vertafore’s WorkSmart enabled us to provide additional support both onsite and remotely to share the workload, give some relief to local staff, and meet our customers’ needs.”

Jim Dahoney,
SVP, CIO, *Marshall & Sterling Insurance, Inc.*

Visit for more info

or call 800.444.4813