

Create business winning proposals with ease

Proposal builder provides an integrated tool to create professional, consistent, and high-quality customer-facing proposals through your Vertafore Agency Management System. This enables your agency to efficiently build business winning documents to grow your book of business, retain existing customers, and deliver a better customer experience.

Benefits:

- **Easily build polished and consistent proposals:**
With an easy to use interface, deliver proposals with custom fonts, colors, tables, and images that fit your agency's brand and help you stand out
- **Service customers quickly to provide an exceptional experience:** Pull dynamic data directly from your management system to significantly reduce errors and save time manually entering data
- **Increase employee efficiency with templates:**
Help staff increase efficiency and consistency with reusable sections and saved and default templates

" Our staff has already seen the benefits of the Proposal Builder! It has been a huge time saver for our staff! We love being able to customize each proposal and formatting the proposal is so easy! "

Leigh Ann Baker,
CL Team Leader, IMG

Contact us
or call **800.444.4813**

Features:

- **Brand styles:** Pull dynamic data directly from your management system to significantly reduce errors and save time manually entering data
 - Brand styles based on lines of business, locations and divisions
 - Configure your font, agency colors, and table formatting
 - Choose a fast and easy Simple Cover Page or robust Custom Cover Page
- **Reusable Sections:** Create and manage a library of sections to build standardized blocks of content for consistent proposals
 - Pull specific policy information directly from your Agency Management System
 - Decide which sections can be edited or locked
 - Supported content includes text, images, PDF's, and Excel sheets
- **Proposal Templates:** Build, manage and publish custom proposal templates for your agency
 - Create and segment templates based on the category of your choosing
 - Utilize default templates created by Vertafore

Note: Proposal Builder is accessible for all Sagitta In-House and Online customers. Vertafore Single Sign-On credentials are required for AMS360 Online customers to access.