



## From lead to sale to service.

Your management system provides comprehensive account information, including policies, claims, and details on any activity you've had with a customer. But do you need more visibility into your sales pipeline?

Vertafore Agency SalesTrack allows producers to track leads, manage opportunities, and service their accounts. Managers have key performance indicators to manage, mentor, and support producers and to accurately forecast production. Vertafore Agency SalesTrack is integrated with AMS360® Online; information is synched with the management system at critical steps in the process, eliminating duplicate data entry.

### Pipeline Visibility

Are you on track to meet your production goals?

With Vertafore Agency SalesTrack, you can answer that question with a glance at the dashboard. Whether you are the sales manager or a producer, your key performance indicators are displayed on your landing page.

#### Sales Manager Dashboards display:

- Estimated Future Sales.
- Monthly Won Opportunities.
- Team X-Dates.
- Deals Won vs. Lost.
- Sales Pipeline.
- Peer-to-Peer Comparison.

#### Vertafore Agency SalesTrack

- Designed specifically for your sales staff.
- Web-based for access anywhere.
- Integrated with the management system, eliminating duplicate data entry.

#### Producer Dashboards display:

- Tasks (To-do List).
- Open Leads.
- Open Opportunities.
- X-Date Report.
- Sales Pipeline.
- Monthly Won Opportunities.
- Peer-to-Peer Comparison.

Sales managers and producers can customize the layout and information displayed on their dashboards.

## Manage and Report on Leads and Opportunities

With leads and opportunities on the landing page, it is easy for producers to prioritize their work and ensure leads don't simply fall through the cracks. Leads can be entered manually or imported from lead lists.

As a manager, you can evaluate whether your lead sources generate quality leads for your team and see when leads were last followed up by a team member.

Managers can also quickly view the activities completed by team members and report on how well opportunities convert by sales stages. This information allows sales managers to evaluate how effective their team is at moving opportunities through the sales pipeline so they can remove bottlenecks, or provide targeted training.

## Service Current Customers

With SalesTrack, you can easily manage prospects and related opportunities, as well as provide service to your existing clients. The integration with AMS360 not only creates new clients, submissions, and activities at the appropriate steps in the sale process, it brings account information from the management system into SalesTrack. From the Account Summary screen in SalesTrack, you have access to claims, policies, notes, suspenses, submissions, and notes.

## Workflows Integrated with the Management System

SalesTrack will allow each person in the agency to complete their part of the sales process, in the system they use. Producers enter leads and start submissions; the customer service representative receives the submission in the management system and follows up with the carrier—each working in the system tailored to their needs.

The fields are mapped so data flows smoothly bidirectionally. Producers can add new client and submissions data and that information is automatically created in AMS360. Management system users can update client records and these changes are displayed in SalesTrack.

### Commercial Lines Workflow

- Lead Quality.
- Develop.
- Propose.
- Close.

### Requirements

SalesTrack is integrated with AMS360 OL. With a SalesTrack license, producers will manage leads, opportunities, and service their accounts. SalesTrack requires Vertafore Single Sign-On (VSSO).

"Our agency needed a CRM to provide our producers with an efficient way to manage their prospecting and provide our management with visibility into the producers' efforts toward writing new business."

**Drew Gilbreath**, *CIC Vice President of Operations*  
*Sutter, McLellan & Gilbreath, Inc*

Contact Us

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