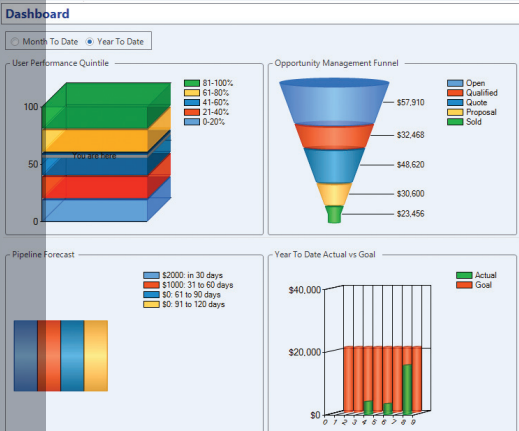


Pipeline Manager



The first and only insurance-specific sales management platform, Pipeline Manager transforms the way agencies sell—increasing sales overall.

Are you able to analyze your sales pipeline in real-time and create an effective plan to meet your sales objectives? Pipeline Manager offers your agency a tool that will transform the way you sell personal and commercial business. Easy to implement, with an intuitive interface, Pipeline Manager gives your producers a comprehensive solution for managing leads, opportunities and X-dates.

Forecast accurately and close more business with Pipeline Manager

- Effectively forecast sales by producer, by line of business, or by location
- Predict trends throughout your sales pipeline to readjust resources and close more business
- Gain access to the data you need in three clicks or less
- Work efficiently using the easy to learn, intuitive interface

Insurance-Specific Platform

The only insurance-specific sales automation platform available today, Pipeline Manager includes hundreds of lines of business, designed for the way producers sell. The tool requires no customization or special training—Pipeline Manager makes it easy for you to get started immediately.

- See data for hundreds of lines of business across all categories, discovering the full sales potential of each prospect
- Gain insight into close rates for specific lines of business

Easily Manage Leads, Opportunities and X-Dates

With simple and easy-to-use lead, contact and opportunity management tools, Pipeline Manager allows producers to focus their time actively selling to prospects.

- Develop consistent sales processes for all lines of business within your agency
- Create a detailed sales road map for your producers
- Eliminate sales lost due to neglected leads

- Maximize sales revenue while increasing close ratios
- Speed up lead conversion
- Cross-sell across your client and prospect base
- Monitor sales activities in real-time from a single display
- Convert missed X-dates into new opportunities

A Mobile Solution For Producers

Pipeline Manager provides mobile access to contacts, opportunities and activities so producers can be productive, regardless of their location. Using smartphones or tablets, your producers can call a contact or map an address with the tap of a finger. Mobile access to relevant data means your producers have more opportunities to be in the field, generating sales.

Simple to Use, Easy to Implement

With built-in dashboards and reports, automated task workflows and a simple interface, agencies can rapidly deploy Pipeline Manager to capture maximum ROI.

- Rapidly on-board new producers with a simple, easy-to-learn interface
- Import existing prospect lists quickly and seamlessly
- Gain valuable insight with intuitive reporting that is available without extensive training or third-party consultants

Increased Visibility and Accountability

With Pipeline Manager, you can see your sales activities and pipeline in a new and exciting way. With rich graphical content at your fingertips, it is easy to identify significant trends and create accurate forecasts.

- Gain insight into your agency's lead funnel, preventing lost opportunities
- Allocate your budget intelligently with lead source performance metrics at your fingertips
- Transform sales processes using insight gained from powerful pipeline dashboards that display data by individual producer
- Plan more accurately by forecasting revenue pipeline months in advance
- No technical installation process is involved—you will be up and running with Pipeline Manager in hours

Dynamic Integration with PL Rating™, AMS360®, Sagitta® and BenefitPoint®

Pipeline Manager includes integration with PL Rating, AMS360, Sagitta and BenefitPoint, offering users an easy way to export both personal and commercial

For more information about Pipeline Manager, contact a Vertafore® Account Manager at 800.444.4813.

lines opportunities from Pipeline Manager.

- Export customer and prospect records without re-entering data
- Enable producers and CSRs to focus their time on selling to clients, rather than re-entering data into multiple applications

Write More New Business

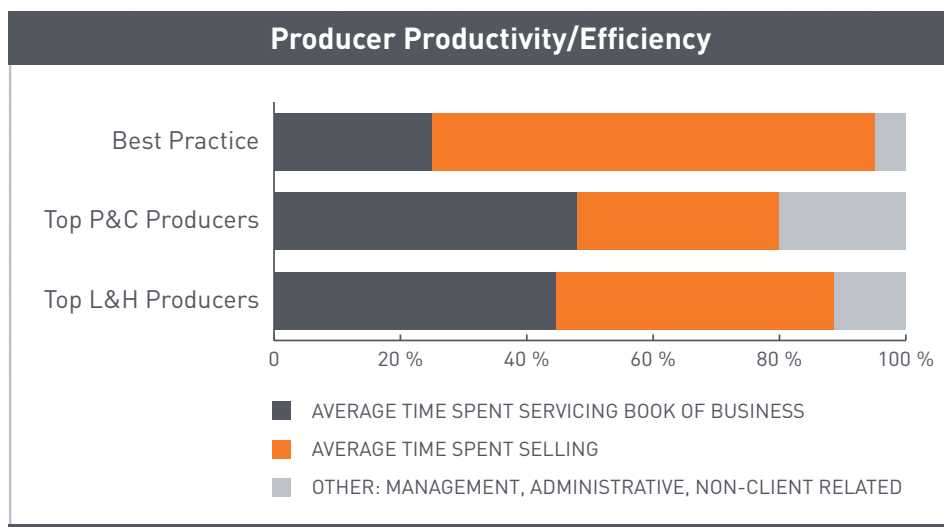
Best practices indicate that to be truly effective, producers need to spend 70 percent of their time selling, yet even the most successful P&C producers

only spend up to 32 percent of their time selling. Even the most successful producers could be writing more new business.

With Pipeline Manager to manage leads and prospects, your producers can spend more time selling, your agency can write more business, generate more revenue and grow.

Get Started Today

Call 800.444.4813 today for a personalized demonstration of how Pipeline Manager can help you write more new business.



Source: Hales & Company.



Vertafore is the leading provider of software and information to the insurance distribution channel, including independent agents, brokers, MGAs, carriers and reinsurers. Vertafore leverages a unique industry presence to deliver meaningful solutions—powerful technology, critical information and robust insights to help organizations effectively respond to business challenges and capture new opportunities. Vertafore solutions are helping more than 17,000 customers and 500,000 end users gain a competitive advantage to accelerate their business performance.

