



Vertafore™

Unleash your potential

Bennion Taylor



Vertafore Solutions

- AMS 360®

Benefits

- Intuitive and easy to use
- Eliminates paper
- Instant access to customer history
- Improves service levels
- Faster renewals and verifications
- Quicker quoting

Proven Results

- Reduced account quote time by 83%
- Increased business with fewer staff
- Decreased mail-sorting time by 66% per day

Bennion Taylor eliminates paper, saves time and increases service levels with easy-to-use AMS 360.

Bennion Taylor Insurance has never been afraid of hard work. The agency has a long history of going the extra mile—being there when their customers needed them the most. When they decided to move from their manual processes to an agency management system, everyone on staff was up for the challenge.

“The world was going paperless and our office still used manual telephone logs to keep track of our customer and prospect interactions—all signed, dated and placed in customer files,” explained Don Taylor, president of Bennion Taylor. “We knew we needed an agency management system. We chose a solution that sounded like the greatest thing around, and it ended up being like the story of ‘The Emperor’s New Clothes’. After installation, not a soul at the agency could figure out how to use the system—even after training.”

“We all sat through online tutorials where a little man ran up and down the screen pointing at things and at the end of it all, we still couldn’t figure out what the heck he was saying,” explained Taylor. “There were 25 variations on each task; nothing was consistent among the features. The fact is, we had a new system and we all felt like we had to go through the equivalent of getting a Master’s degree to use it.”

AMS 360 to the Rescue

When it became obvious that the system wasn’t going to work for the agency, a new hire who was familiar with Vertafore encouraged Taylor to

take a look at AMS 360. “We were amazed at the difference—how easy and intuitive it was,” said Taylor. “Once you learn to perform one function, you can use the same technique to do others. Everyone caught on right away.”

Almost immediately the agency began seeing benefits from eliminating the ‘crutch’ of paper files. “AMS 360 makes us look more professional while saving us time in the process,” said Taylor. “When a customer phones in, we can go right into the activity and report it, instead of writing things down manually. When a customer calls with an inquiry, we don’t even have to put him or her on hold to get the answer.”

AMS 360 has also helped Taylor retain customers. “We had a client who was very upset, who said we cancelled his account without contacting him about payment,” Taylor said. “We were able to pull up the history of that customer in an instant, and give him the exact dates and times we had contacted him, sent e-mails and left messages. He apologized and asked us how he could regain his coverage. What could have been a lost customer was a renewing customer. That’s a cool thing.”

Service in an Instant

Prior to AMS 360, quoting business was a lengthy process. “We used to print out a form, fill it out by hand, and fax it to each company for a quote, which could take up to an hour,” Taylor said. “Now, we create a form on AMS 360, fill it out online, and because AMS 360 interfaces with Microsoft® Outlook®, we submit to the carriers electronically. The process that took an hour now takes ten minutes.”

Renewals are easier with the new system as well. “When it’s time for a renewal, we go to the declarations page on the policy and e-mail this review directly to the customer. It shows property value, liability and a list of all certificates, as well as a detail of where we’ve saved them money.” Taylor explained. “Not only do we save time and postage costs, but our customers really appreciate our efficiency. In many cases, they renew without a personal visit because we’ve given them everything they need.”

Internal Efficiencies Add up to Big Savings

During the time that Bennion Taylor has been running AMS 360, they’ve realized some amazing internal efficiencies. Although business is up, they’ve been able to reduce their eight-person agency to seven. They’ve cut postage costs. And they’re not spending valuable time processing mail.

“We can log all of our prospect activity online. If someone calls with an inquiry in November about a policy that’s up in June, I can make note to follow up in April, mark it as critical and get a prompt to follow up.”

— Don Taylor, President, Bennion Taylor Insurance

“It used to take us two hours to open and sort the mail,” Taylor said. “Now, it’s less than 20 minutes on Monday, which is our busiest day.”

AMS 360 has also given Bennion Taylor a platform for tracking prospective customer activity until they close the business. “We can log all of our prospect activity online. If someone calls with an inquiry in November about a policy that’s up in June, I can make note to follow up in April, mark it as critical and get a prompt to follow up,” said Taylor. “That’s the whole thing about AMS 360. As an owner-manager, it helps me retain control. I can see what’s going on. I can manage my accounts and prospects. I can serve our customers better. We’re definitely big fans.”

Taylor and his staff have seen such a difference with AMS 360 that after only a year, they’re recommending the system to their peers. “I think a big testimony to our success with AMS 360 is that we’ve already seen results, and we’re already

recommending it to other agents who tried ‘The Emperor’s New Clothes’ system,” Taylor said. “And, we’re only just beginning to learn all we can do with our system. That’s now part of the fun—learning more.”

Look for more success and enthusiasm to come.

Vertafore is the leading provider of software, services 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 15,000 customers and 200,000 end users gain a competitive advantage to accelerate their business performance.

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800.444.4813