

Master your content workflow

WorkSmart® is the leading Enterprise Content Management (ECM) solution designed for insurance professionals by insurance professionals. With a best-in-class file-based document management system and workflow automation software, WorkSmart gets the **right work** to the **right person** at the **right time**, helping you serve customers faster, reduce manual tasks, and streamline operations to improve your bottom line.

Features you need

- **Take control of your content:** Use our **intuitive file-tree** to easily organize and preserve your documents and service customers quickly with policy and claim information at your fingertips.
- **Become a master of automation:** Big “I” **best-practice workflows** are built in to help you reduce time spent on manual tasks and improve overall efficiency.
- **Boost your productivity:** With **versatile business process dashboards**, you can monitor employee processes, reduce bottlenecks and gain more visibility into your business over your business in real time.
- **Access anywhere, work everywhere:** Enjoy a **sleek, user-friendly interface** designed for today's mobile workforce, allowing you to work seamlessly from any location.
- **Customize your ecosystem:** **Robust API functionality** easily integrates WorkSmart with your favorite Insurtech solutions.
- **Work smarter in the cloud:** Access **WorkSmart Online** through the Vertafore cloud to keep the complexity out of your infrastructure and enjoy greater productivity.

Experience the difference



“Creating continuity in our workflows and transparency of tasks throughout our organization would be impossible without WorkSmart.”

Melyssa Mappus

Director of Training,
Correll Insurance Group, LLC



Unlock your agency's full potential with AgencyOne®

WorkSmart is also part of AgencyOne, our connected platform designed to simplify, automate, and elevate how you work.

Within AgencyOne, WorkSmart continues to centralize content and streamline workflows while connecting seamlessly with AMS360®, Sagitta®, BenefitPoint®, InsurLink™, and TransactNOW® to deliver a truly integrated agency management experience.

Visit for more info

or call 800.444.4813