

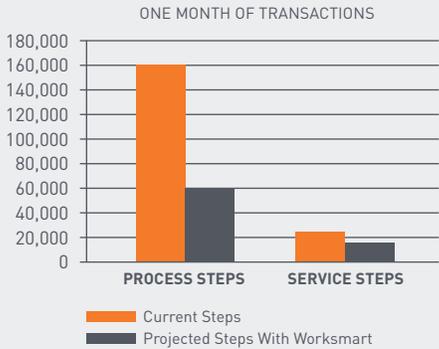


**Vertafore™**

Unleash your potential

# WorkSmart Powered by ImageRight

WorkSmart takes agency automation to new levels



WorkSmart reduces the number of steps it takes to complete routine processes and customer service activities by 57 percent.

**WorkSmart key benefits:**

- Establish customized, intelligent workflows for your business
- Easily monitor accounts and distribute staff workloads evenly
- View entire files quickly and efficiently

**“We grew 25 percent without adding staff...”**

-Heather Cochrane, director of business management solutions, Renaissance Insurance, Boston, Mass.

**“An ordinary document management system didn’t deliver the impact our agency needed, so we chose WorkSmart.”**

-Kim Ayala, president, Landscape Contractors Insurance Services, Fresno, Calif.

**It’s time to take your business to the next level.** You’ve mastered being paperless, your producers and account managers are busy selling and processing and your business is humming.

But is it booming? What if you could ensure your producers and account managers could spend all their time selling and servicing, rather than getting bogged down with processing? What if you could cut in half the number of steps it takes to complete each process? What if you could see what each person in your agency is working on, without ever leaving your desk?

WorkSmart™ gives you the unprecedented insight to impact key business metrics on a daily basis. Driven by the data in your management system, WorkSmart provides the intelligent workflows you need to automate processes, reduce the number of steps it takes to get things done and increase capacity by ensuring you always have the right people on the right tasks.

### Take the Next Step

You’ve already realized the benefits of electronic file management. The next level is content management and intelligent workflow with WorkSmart.

More than the typical workflow functionality in an agency management or document management system, WorkSmart not only manages your documents and processes automatically, but intelligent workflow routes work through your agency based on characteristics of the document itself.

For example, the workflow can be customized according to policy limits or deductibles (or anything

you want), so it routes automatically to the people you designate to handle particular types of work. So you no longer need to rely on people to route things properly. WorkSmart dispatches it instantly and automatically so it simply appears on appropriate workers’ to-do lists, which optimizes your staff.

The information flows in and out of your agency management system as needed and can either drive or be a component of the workflow.

### Insight Equals Optimization

With work routing electronically through your office, managers can easily view the task lists and workloads of everyone in the agency.

From a dashboard you can at a glance view work that has been completed, is in progress or is upcoming—all without ever leaving your desk. You can see how much workload each person has, how long tasks are taking to complete and identify underutilized employees. This allows you to change and optimize on the fly.

Analyze your business at any level with reports that show any person's tasks, any workflow or even any step in the process. So you see how much time certain things take or where roadblocks may be occurring.

With this insight, refine your business processes for optimum efficiency, truly taking advantage of all the talents of your staff and ensuring time is maximized.

The ease of adjusting workflow also means tasks can be easily transferred from one person to another to manage sick days, vacations and over-burdened employees. You can do this whether your employees are sitting side-by-side or across the country from each other.

WorkSmart enables you to ensure your high-value sales and service employees are not bogged down in administrative tasks, but are free to spend their time on revenue-generating activities. This not only adds value to your organization, but also keeps employees happy doing what they do best.

## How Does it Work?

While you likely have standardized business processes in your agency, they probably require each person to not only remember what to do at each juncture, but also require execution in precisely the same way each time. This leaves a lot of room for human error and inconsistency.

**“Before WorkSmart, our servicers or their account assistants handled the processing at each individual office. With WorkSmart, we were able to create a centralized processing pool with three assistants who handle processing for 12 people.”**

— Michelle Hoffert, business systems analyst, Flood & Peterson, Greeley, Colo.

With WorkSmart, the intelligent workflows feed each person's task lists. Employees need only select a prioritized item on their task list to see a reminder of exactly what needs to be done, any associated documents or files and any data needed to complete the task.

Once the job is finished, the worker marks it complete and the task immediately continues its journey either to the next person for approval or to completion. And better still, each of these steps are documented within the system for management analysis and refinement—so you can always be optimizing.

When you're able to view and manage workloads any time and you ensure the right people are working on the right tasks, you can increase your agency's capacity.

That means you can pursue new business without adding staff,

provide quicker and more responsive customer service and optimize every process in your business.

## Extend the Power of WorkSmart

Your data is a key component to taking your business to the next level. With the majority of your data housed in your agency management system, it's critical that your systems work together. WorkSmart features integration with Vertafore agency management systems including AMS360®, Sagitta® and BenefitPoint®.

## Get Started Today

Call today for a personalized demonstration of how WorkSmart can help you take your agency to the next level.

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.

©2010 Vertafore, Inc. All rights reserved. Trademarks contained herein are owned by Vertafore, Inc. The names of actual companies and products mentioned herein may be the trademarks of their respective owners. VAM.DS.WS.0410



vertafore.com  
800.444.4813