



**Vertafore**

Unleash your potential

**Success Story**

# The Salmon Agency

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*Lincoln Salmon, president, The Salmon Agency*

## Agency Snapshot

Since its founding in 1999, The Salmon Agency has been dedicated to providing superior service to the customers and communities it serves. Based in Oviedo, Fla., this five-person firm began as a captive agent for a large nationwide P&C carrier. Today, the agency offers personal, financial and business insurance from a number of carriers across the United States.

## Vertafore® Solutions

- AMS360
- TransactNOW®

## Benefits

- Reduces manual processes and client management through spreadsheets and paper files
- Enables users to move seamlessly from the management system to carrier sites for endorsements
- Provides complete client information available in one click
- Delivers comprehensive reporting, including the ability to track commission by producer

## Proven Results

- Increases efficiency by an estimated 60–70 percent
- Enables agency to do more with the same number of people
- Reduces steps, speeds efficiency and enables the agency to deliver a higher level of customer service

## AMS360® makes the Salmon Agency 60 to 70 percent more efficient.

Lincoln Salmon is the type of person who sets his goals high. He started his agency in 1999 in Oviedo, Fla., as a captive agent for a large national P&C carrier, and was soon winning awards for his agency's performance. Though he is still a captive agent for that large national P&C carrier, he has begun working with multiple carriers on a daily basis through the carrier's expanded market program. Today, the Salmon Agency represents more than 25 additional insurance carriers—providing its clients with personal, financial and business insurance coverage and other tailored insurance solutions.

Like many captive agents, Salmon had been using management solutions provided by the carrier for whom he is a captive agent, but this support was available only for that carrier. Salmon says his agency needed a new management system to accommodate his growing business. Although his original management system provided the tools his five-person agency needed to take care of business for that carrier, it did not help him manage his independent accounts, which make up more than 50 percent of his business.

"We were using spreadsheets and paper files, plus another system for document storage," said Lincoln Salmon, president of The Salmon Agency. "If a customer called in, we had to first go out to a public drive to see where that client writes, then go to the individual carrier website to get the information we needed to answer their policy questions."

Because the electronic files were read-only, Salmon's staff was unable to add notes or update the spreadsheet online.

"We knew that if we wanted to grow, we would have to invest in a management system that gave us more capacity, and would help us service our customers more efficiently," Salmon said. "We live in a world of texts and instant messaging. Our clients expect that same type of immediacy from us."

After looking at numerous options, one solution stood out among the rest.

"Vertafore's AMS360 and TransactNOW encompassed everything I needed to support the agency: accounting, document storage and connectivity to carrier sites," Salmon said.

## An Easier-than-Expected Change

As with any new system, Lincoln was prepared for a long learning curve to get his staff up-to-speed. But with AMS360's .NET platform and intuitive user interface, the transition was far easier than he had expected.

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— Lincoln Salmon, president, The Salmon Agency

In fact, Salmon says his staff didn’t even need to complete the company-provided training program, Vertafore University, to learn how to use the system.

“I signed our staff up for Vertafore University so they could learn how to use the system, but I actually cancelled because they didn’t need the extra help,” Salmon said. “And my people are anything but tech savvy.”

## From Spreadsheet to Streamlined Service

Now, when a customer calls, Salmon’s staff doesn’t have to search through spreadsheets and files to respond. Based on a screen pop showing the incoming caller’s phone number, staff members can easily pull up a single screen that displays the full portfolio of that client’s policies.

Instead of static, read-only files, producers can make notes on client files, so any staff member can see a full, current picture of the account, its policies and other pertinent data.

In the past, agency personnel had to go to multiple carrier websites to market accounts. Not only was this a time-consuming process, but it required personnel to manage multiple passwords, each relating to a different carrier.

“With TransactNOW, our people can go directly from AMS360 to carrier sites for endorsements,” Salmon said. “They can get quotes from participating carriers with one click.”

All of these efficiencies have paid off in a big way.

**“As a smaller agency in a challenging economy, these efficiencies are crucial to running a successful business.”**

“AMS360 makes us 60 percent to 70 percent more efficient than we were before we had it. Everything is easier, from looking at customer portfolios to printing certificates,” Salmon said. “When we first looked at the system, our Vertafore rep said that the efficiencies we’d gain would save us more than one staff member in time. She was absolutely right. If we didn’t have AMS360, we’d have to have twice as many people.

“As a smaller agency in a challenging economy, these efficiencies are crucial to running a successful business.”

## Comprehensive Reporting and Marketing Support

In addition to making his agency run more efficiently, AMS360 helps Salmon manage his business and promote its growth. The system gives him the capability to run several different reports simultaneously, so he can stay on top of everything from individual producer performance to at-risk accounts.

“Reporting is extremely important to running an agency, and AMS360 gives us the tools we need,” Salmon said. “I spoke to another agent today,

who said that she didn’t have a way to look at her total book of business and agency value. She had no way to see what was going on with her agency. I told her about AMS360. I said, ‘this system will help you see everything.’”

In addition, Salmon uses AMS360 to generate target lists for cross selling—using the mail merge function to quickly generate direct mail letters. Although he’s just begun using this feature, the agency is already seeing significant returns.

“We are a growth agency, and AMS360 helps us run campaigns that we couldn’t manage before,” he said.

Later in the year, Salmon will start using more of AMS360’s accounting features, and then, transition all profit-and-loss functions to the system. His goal is to continually use more system functionality, not only to get the most from his technology investment, but to stay efficient and competitive in a changing market.

“The Florida market has dramatically changed. In the past, one carrier could do it all—we only had one company to deal with. Today’s marketplace demands that we have relationships with multiple companies, operating under multiple guidelines and rules. This makes our jobs more complex,” he said. “AMS360 pulls all of the information we need to work in this new environment into one system, so we can be more productive. It brings an amount of normalcy to what do.”

And the success story is just beginning.



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