



Vertafore™

Unleash your potential

Sattler Insurance Agency



Sattler insurance agency orchestrates smooth upgrade to AMS 360 and reaps the benefits.

Sattler Insurance Agency thrives on adventure. This Northern Idaho-based, 12-person agency is the nation's largest insurer of whitewater outfitters, both writing and issuing policies in 38 states. But when it came time to upgrade from AfW® to AMS 360, owners Nancy and Jim Sattler wanted to keep the rough waters to a minimum.

Vertafore Solutions

- AMS 360®
- Service 24/7
- Performance Analyzer™

Benefits

- Eliminates paper
- Easy to learn and use
- Everything is just "one click away"
- Instant access to complete customer view
- Accounting feature makes it easy to see bank balances and daily deposits for quick cash-flow management
- Streamlined renewal management
- Intuitive workflow

Proven Results

- Smooth upgrade from AfW to AMS 360
- Increased efficiency by 25 percent on personal lines accounts
- Comprehensive customer view saves approximately one hour a day

When Jim and Nancy Sattler bought what is now Sattler Insurance Agency in 1994, accounting was handled in a black, spiral-bound journal and policies kept in awkwardly broken paper files. As they expanded the agency into the recreational insurance niche, the Sattlers also began automating—choosing AfW as its agency management system. By 2003, the business was growing, thriving and totally paperless. By 2007, the owners knew it was time for the next step: upgrade to AMS 360.

"There needed to be a net gain for us before we changed systems," said Nancy Sattler. "I looked at the product—and liked the fact it had imaging management and drag-and-drop e-mails and documents. When agencies are considering a change, they have to ask, 'Why did I buy an agency management system in the first place?' To make the agency more efficient. For us, AMS 360 would give our staff the next level of efficiency, so we could turn around and pass the time saved along to our clients in the form of improved service."

Preparing for Change

After deciding the time was right to make the transition, Sattler and team started preparing the agency data for the upgrade. "It's as if you're moving from New York to L.A. You are not going to move all of the junk you've accumulated over the years," explained Sattler.

"That's what you have to do when you're prepping for a system migration—clean out the junk, move only what you need, and pay attention to your data integrity—or the same messed up data you had in your previous system will transition to AMS 360."

The agency took two months to prepare its data for the upgrade. "We met weekly and had specific goals," said Sattler. "AMS 360 has a very strong contact book, so we made sure our contact and company information was accurate. If we hadn't used a company for six or eight months, we marked it as inactive. Vertafore has an upgrade tool that's great for data cleanup." Along with data preparation, Sattler adjusted the agency's workflows and processes to function in the AMS 360 environment.

Another large part of the agency's pre-migration planning came in the form of training. "We have dual monitors at our agency. We ran AfW on one and the training agent for AMS 360 on the other. When a CSR performed a task on AfW, he or she would have to perform the same task on AMS 360. That's more effective than just saying, 'Go out and play on the system,'" said Sattler. The agency also set up a schedule for employees to leave their desks and go back to the computer room for concentrated training, as well as time to participate in webinars. In addition, a Vertafore trainer came on-site to work with the agency for three days.

“As an owner, you have to commit to pulling people off revenue-generating work to get up to speed on the system—and know that you’re probably going to take a hit in efficiency the first 30 days. But you do that for the long-term benefits,” said Sattler.

Did all these efforts pay off? “That first day, we all came in, turned on our computers and got into AMS 360 like we had been trained. At the end of the day, I looked at my staff and said, ‘Okay, we did it,’ said Sattler. Were there surprises? Of course. But if I had to choose one word to describe that day, it would be ‘success.’”

Delivering on the Productivity Promise

Although Sattler Insurance Agency is still a relatively new AMS 360 agency, it has already started to see significant results. “Our personal lines department estimates an overall 25 percent gain in efficiency, and we’re really just getting started,” said Sattler. “Now, everything is just one click away, instead of multiple clicks.”

The 360-degree customer view means faster, more efficient service. “The dec page literally shows every coverage a customer has—instead of having to go through four or five steps to get to that information. That saves about two minutes a call. It may not sound like much, but when you multiply that by 30 calls a day, it adds up in a big way,” said Sattler.

This comprehensive customer view has delivered another benefit that isn’t measurable but is equally important. “The dec page gives us the opportunity to be counselors instead of paper-

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— Nancy Sattler, Owner, Sattler Insurance Agency

pushers,” explained Sattler. “For example, if a customer calls with an inquiry, our CSR might notice that she has low limits and consult with her about that, too. We serve the client better and we sell more.”

Sattler also is impressed with the drag-and-drop technology. “You simply click on an e-mail or other electronic document and drag it over to the activity, instead of having to handle it like an attachment,” she said.

The renewal management tool provides Sattler with a list of policies that are going to expire in the next 90 days. “We used to use a printed renewal list with notes. Now, everything’s electronic, and everyone who’s involved with the account has access to what’s going on—not just the paper custodian,” said Sattler.

“Performance Analyzer is particularly a big deal to us, because we have licenses in 38 states,” said Sattler. “If one state’s license goes from \$300 to \$3,000 a year, I can go in and quickly review all the business we write in that state to see if it’s worth the additional cost. Before Performance Analyzer, we had to write macros to get that information.”

Sattler can easily check bank balances, daily deposits and manage cash flow in

one step. Plus, the intuitive workflow in AMS 360 streamlines her accounting operation. “Let’s say I’m billing a broker who wrote new river business,” explained Sattler. “When I do the billing, the system asks me if I want to print or e-mail the bill. I click e-mail and the system opens Microsoft Outlook®. After I send the e-mail to the broker, I get a pop-up asking me if I want to add the e-mail to that broker’s activity. Everything happens right there.”

In addition to AMS 360, the agency uses Service 24/7 to serve the unique needs of its clients. “Our clients are river people who don’t work the same hours we do,” said Sattler. “If they’re at the river and forgot their insurance certificate, the forest service won’t let them in the water. Now, instead of calling us at 3:00 in the morning, they can get their certificate online, around the clock.”

But don’t think Sattler is sleeping in late these days. She continues to meet weekly with her staff on AMS 360, sharing tips and tricks and ensuring the agency gets the most out of the system. She’s active in the AMS Users Group on the AMS 360 R&D committee. And she looks forward to gaining more efficiencies in the months 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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vertafore.com
800.444.4813