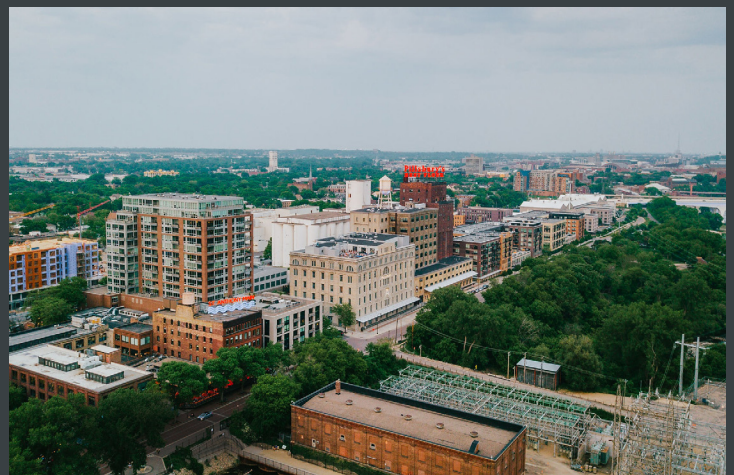




Ross & Yerger

Company snapshot

Ross & Yerger is an employee-owned independent agency headquartered in Jackson, Mississippi. Since 1860, Ross & Yerger has provided insurance services and industry expertise to its clients, taking pride in building and nurturing relationships along the way. As they continue to serve their communities, Ross & Yerger strives to use technology that allows their employees to spend time on what matters most: their clients.



Vertafore solutions

- Sagitta
- InsurLink

Proven results

- Logins on InsurLink have nearly doubled from ~1,000 to ~1,900



Ross & Yerger has been serving their clients and communities for 162 years. As a well-established agency, they were looking to make their lives simpler without experiencing extreme changes when expanding their technology stack.

To continue building a positive customer experience, Ross & Yerger knew they wanted to adopt a solution that would allow their clients to issue their own certificates whenever they needed. Having explored multiple options, they finally opted for InsurLink, which allowed them to accomplish what they were looking for and more.

"InsurLink is so much easier. And our employees could keep doing their job the way they always knew how to do it. That is what they loved about InsurLink: it did not create a lot of change."

Dian Lewis

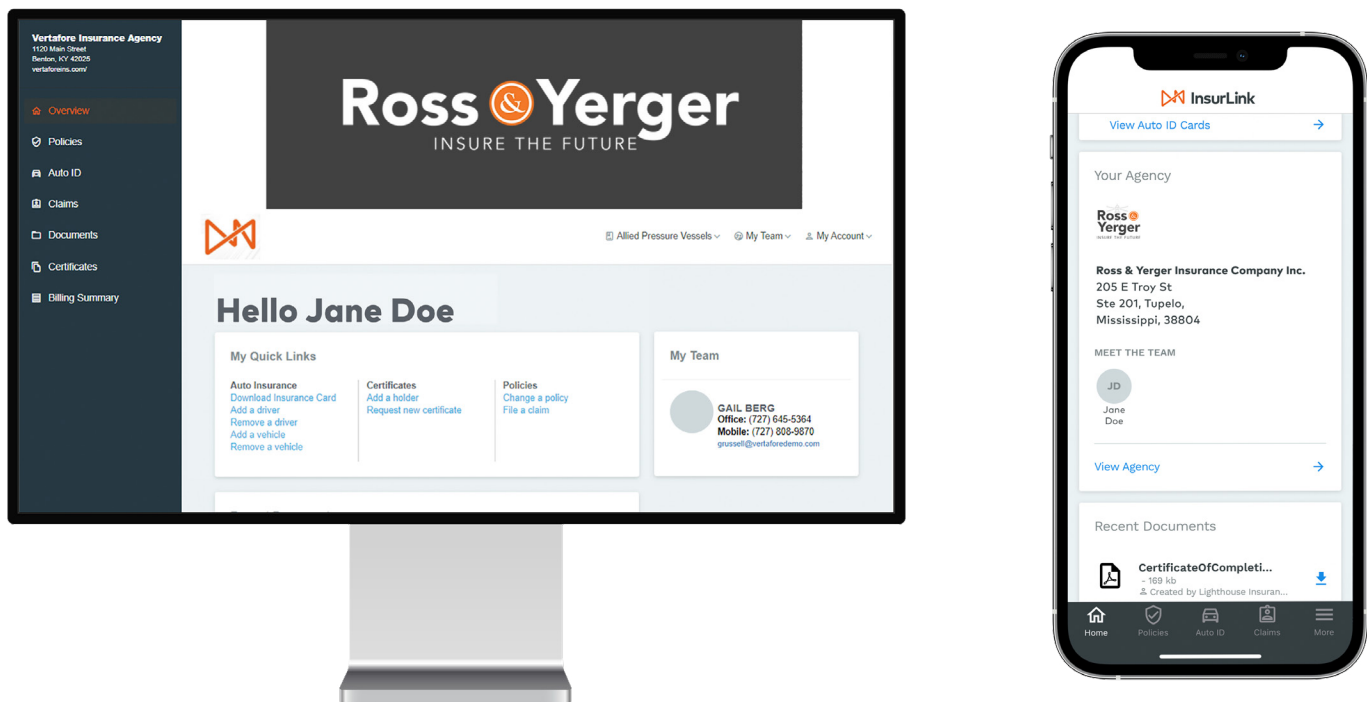
InsurLink provided a solution that met their needs while being easily adoptable and giving employees ease of mind as they got up to speed. Not only does InsurLink provide Ross & Yerger's clients with 24/7 access to documents, endorsements, and policy information, it creates the opportunity for employees to be more efficient in their day-to-day jobs.

InsurLink's self-service capabilities for end-insureds are beneficial to both clients and employees. It gives employees time back in their day to focus on strengthening relationships while still staying in the loop with their clients.

Easy set-up, highly customizable

For Ross & Yerger, InsurLink was an easily adoptable solution that did not cause disruption during the adoption period. During the pandemic, Dian was able to set up InsurLink behind the scenes while also having employees and clients test the solution to ensure it was working properly and meeting their needs.

After official roll-out, employees at Ross & Yerger have seen many benefits and have been continuously working to encourage adoption of the product. They now include InsurLink in their proposals to further promote InsurLink to their clients. To show the adoption internally and encourage employees to suggest it to their clients, Dian distributes quarterly reports to employees to demonstrate the frequency of end-users utilizing InsurLink.



Through this process, Dian has seen success in getting clients onboarded and using the product. One client, who was initially resistant to technology adoption, is now one of the highest users of InsurLink. Through the report, Dian was able to determine that this client had logged in to InsurLink roughly 170 times in the last 4–5 months. This client's adoption and use of the product proved its efficiency and has helped to encourage employees to sign up more of their clients.



Save time to focus on other tasks

Not only have clients adopted the solution and seen its benefits, but employees have also seen improvements in their day-to-day roles.

With its self-service capabilities, InsurLink reduces the number of low-value phone calls and interactions between employees and clients. One employee even saw an 82-call reduction now that their client can access information on their own how and when they want.

Further, InsurLink's seamless integration with Sagitta saves employees time by not having to go backwards and check on holder information or make sure that the data lines up. Instead, everything is done instantly, and the employees can have confidence that the information is being recorded correctly.

With InsurLink limiting small interactions between employees and clients, Ross & Yerger can take pride in great servicing and building trusted relationships and really meeting the needs of their clients beyond just a policy.



"The numbers really speak for themselves. Everything is done instantly."

Dian Lewis

Ross & Yerger
INSURE THE FUTURE



Contact us to learn more about how Vertafore can help you provide your clients with the digital experience they expect.

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