

Provide your clients with the digital experience they expect

Using InsurLink®, agencies can provide their clients with a digital experience through a branded self-service portal. Clients can access information when and where they want, reducing time spent on service calls and improving employee productivity. Customer retention is improved while reducing E&O risk.

Improve clients' experience and meet their expectations by being faster, more transparent, and more accessible. Free up time by reducing requests so your staff can give advice and round out accounts. Reduce E&O risk using secure communication that leaves a permanent record and cuts the risk of a missed document.

Features you need

- **A branded website for client access:** 24x7 access to your agency so clients can help themselves. Insureds can perform self-service tasks, and securely share files with you—when, where, and how it is convenient for them.
- **Mobile app:** Clients expect mobile access. The InsurLink mobile app gives them the access they expect and provides offline auto ID cards.
- **Time savings:** Self-service frees up your staff for higher value client contact, and clients can help themselves with:
 - Policy information: Check limits, premium, or policy terms
 - Policy change requests: Coverage, changing drivers or vehicles, or coverage limits
 - Auto ID cards
 - Claims inquiries: Status, new, submit information
 - Certificate requests: Issue or reissue, add a holder
- **Logging activity:** Keep a record of interactions in your management system, reducing your E&O risk
- **Secure file sharing:** Share files from the AMS or WorkSmart, and clients also can share documents with you in a secure fashion
- **Real-time updates:** Highly integrated with AMS360 and Sagitta, updates are seen immediately
- **Templates:** Create unique experiences for specific customers by CL/PL lines or other segments
- **Access control for clients:** You decide what access your clients get and when they receive it; controlled onboarding for a better experience
- **Updated user experience:** InsurLink has made a major investment as part of the AgencyOne initiative to improve its experience—leading to a modernized interface and more intuitive user workflows

Some customers have seen potential for

65% reduction in the number of customer inquiries

90% reduction in time spent per certificate or auto ID request

5% increase in retention



"It's a win-win. We give clients the ability to communicate with us the way they want... Since implementing our client portal, retention is up 4%, and we've reduced postage costs by 40%."

Joyce Singler,
Vice President, Jones & Wenner Insurance Agency, Inc.

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