

Create business winning proposals with ease

Proposal builder provides an integrated tool to create professional, consistent, and high quality customer-facing proposals through your Vertafore Agency Management System. This enables your agency to efficiently build business winning documents to grow your book of business, retain existing customers, and deliver a better customer experience.

Benefits:

- **Easily build polished and consistent proposals:**
With an easy to use interface, deliver proposals with custom fonts, colors, tables, and images that fit your agency's brand and help you stand out
- **Service customers quickly to provide an exceptional experience:** Pull dynamic data directly from your management system to significantly reduce errors and save time manually entering data
- **Increase employee efficiency with templates:**
Help staff increase efficiency and consistency with reusable sections and saved and default templates



“Our staff has already seen the benefits of the Proposal Builder! It has been a huge time saver for our staff! We love being able to customize each proposal and formatting the proposal is so easy!”

Leigh Ann Baker,
CL Team Leader, IMG

Some customers have seen potential for

- **Brand Styles:** Control the look and feel of your document with various elements to align with your agency's branding
 - Brand Styles based on lines of business, locations and divisions
 - Configure your font, agency colors, and table formatting
 - Choose a fast and easy simple cover page or robust custom cover page
- **Reusable Sections:** Create and manage a library of sections to build standardized blocks of content for consistent proposals
 - Pull specific policy information directly from your Agency Management System
 - Decide which sections can be edited or locked
 - Supported content includes text, images, PDF's, and Excel sheets
- **Proposal Templates:** Build, manage, and publish custom proposal templates for your agency
 - Create and segment templates based on the category of your choosing
 - Utilize default templates created by Vertafore

Note: Proposal Builder is accessible for all Sagitta In-House and Online customers. Vertafore Single Sign-On credentials are required for AMS360 Online customers to access.

[Contact us](#)

or call 800.444.4813