

Scale complex agency operations and reduce operational drag

Sagitta® helps independent agencies manage complex operations by providing a solid foundation built to support multi-division growth, specialty lines, acquisitions, client servicing, accounting, reporting, and data visibility.

Sagitta's customizable framework provides agency leaders with operational control and flexibility, and its open architecture easily integrates with the API partners you rely on to keep your business on track.

Service teams work with less manual entry and system switching and finance teams have the accounting depth needed to manage revenue, reconciliations, payables, and reporting across divisions and locations. Sagitta advances Distribution Velocity by reducing operational drag across the agency.

More control. Less friction.

- **Adaptive scaling:** Configure Sagitta to fit your operating model as your business grows organically or through acquisition
- **Connect experiences:** Bring teams, data, trusted Vertafore solutions, and third party APIs together to provide your staff with a unified tech stack
- **Simplify everyday work:** Reduce duplicate entry and manual handoffs across policy administration, client servicing, accounting, forms, proposals, and reporting
- **Purposeful customization:** Tailor Sagitta with user-defined quick-entry fields, preferred navigation, grid displays, and accounting workflows
- **Financial control:** Manage complex accounting with interdivisional postings, flexible invoicing, automated direct bill reconciliation, detailed payables, and agency bill installments
- **Data visibility:** Sagitta centralizes client, policy, accounting, and reporting data so leaders and teams can make faster, better-informed decisions across the agency
- **Secure and audit friendly:** Grant or restrict access to sensitive information using role-based permissions, while audit trails track login and user activity



"Sagitta gives us the flexibility to capture the specific data that matters to our agency, then turn it into reporting that helps guide smarter business decisions."

Kate O'Toole,
Agency Operations Manager,
Starkweather & Shepley

Agency outcomes:

- Scale for growth
- Improve financial control and visibility
- Increase staff productivity and accuracy
- Rely on real time operational visibility
- Support faster, better-informed decisions

Visit for more info

or call 800.444.4813