



Satanoff Insurance

Company snapshot

Satanoff Insurance, located in Wayne, Pennsylvania, has been serving the greater Philadelphia area and beyond since 2005. With great pride in being the local agency that clients can trust, Satanoff Insurance continues to build strong relationships with its customers while finding insurance that best fits their needs. And while Satanoff Insurance has built a well-established reputation servicing its clients, Rebecca Ricciardi and team recognize that having a positive employee experience is also key to being successful.

"Customer experience is important to us—it's what we do. But it's also the account manager experience. We want to make sure they have the right tools to be able to serve their customers."

Rebecca Ricciardi

Vice Principal,
Sales and Operations

Satanoff Insurance

Vertafore Solutions

- Commercial Submissions

Proven results

- Standardized the quoting process on the commercial lines side of the business
- Improved workflows, enabling agents to win more business and increase productivity
- Improved onboarding process and ramp-up time for new employees

Increased # of Google Reviews from **5** to **181** in **1 year**

73.5%

Customer referral conversion rate

Vertafore solutions: A technology stack that works together

Working on the operations side of the business, Rebecca understands the importance of having a technology stack that truly works together.

"When looking at technology, it is not just looking at it in pieces. It should be a full picture. I wanted to not just sign up for a solution, but a product that truly integrates with everything."

Rebecca Ricciardi

When searching for the next solution to fit into their tech stack, Rebecca was excited to learn of Vertafore's upcoming release of Commercial Submissions and was even willing to be one of the first to try the product.

Already using Vertafore software, Rebecca knew that Commercial Submissions would have seamless integration with their current solutions and utilizing another Vertafore product provided her with the comfort in knowing that they would not have to place their data into multiple applications. Further, experience with Vertafore's onboarding process gave her confidence that Commercial Submissions would be an easily adoptable solution, allowing her employees to get up-to-speed quickly.

Since embracing the solution, staff at Satanoff Insurance have seen great improvements in their workflows, processes, and overall success in enhancing their clients experience.

Commercial lines workflow

BEFORE

Commercial Submissions



Feeling pressure of a "911" emergency



Client calls in and agent gathers information on the phone



Agent enters information into carrier sites (roughly **15 minutes each** site)



Spending **well over an hour** on just one account—potential of having already lost the client when agent hangs up the phone

AFTER

Commercial Submissions



Client calls in and agent gathers information on the phone and can immediately enter customer information into one place



Get quotes turned around in **under 5 minutes** while the customer is still on the phone



Block the market **within minutes**

Improved employee experience

Along with more efficient workflows and customer experience, Satanoff Insurance has seen how Commercial Submissions improves employees' experience.

With a younger workforce entering the industry, Rebecca and team understand that it is imperative to invest in modern technology that helps employees be successful in their roles. Rebecca referenced a recent college graduate who joined the team in personal lines. This employee had experience with PL Rating and felt comfortable with its ease of use and benefits to quoting. However, when the employee eventually switched over to the commercial side of the business, there was a noticeable gap resulting from the lack of a commercial lines rating solution.



"With Commercial Submissions, you have the confidence that you'll be able to do your job efficiently because you have the right tools to do so."

Rebecca Ricciardi

Once Commercial Submissions was introduced, it streamlined the quoting process, allowing employees to better serve their customers and win more business. Commercial Submissions also enhanced the onboarding process for new hires. With an easy-to-use system that integrates seamlessly, the ramp-up time for new employees is much quicker than before.

Commercial Submissions has allowed Satanoff Insurance to improve in many aspects of their business. With the introduction of the solution to their modern agency tech stack, Satanoff Insurance can focus on what matters most: being a trusted advisor that builds and maintains strong relationships with their customers.

"With growth, you want your tech stack to enable employees to be as efficient in their seat as possible. And if you want to be able to evolve in the industry, technology is necessary."

Rebecca Ricciardi



SATANOFF
INSURANCE



As the Insurance industry continues to evolve and client expectations are changing, the key to remaining relevant and profitable lies in embracing modern technology. Vertafore's Commercial Submissions streamlines the quoting process for simple risk, helping you to win more business, improve profitability, and strengthen your client relationships.

Vertafore is here to be your partner and guide you through this evolving landscape. Contact us to learn more about how we can help you drive growth for your business.

999 18th St | Denver, CO, 80202 | 800.444.4813 | [Vertafore.com](https://www.vertafore.com)

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