

Text message directly from your management system

Customer Expectations: Consumers have become “rewired” mentally and emotionally to their smartphones and tablets, causing them to increasingly abandon traditional communication channels in favor of digital communications, such as texting — both in their personal and business lives.

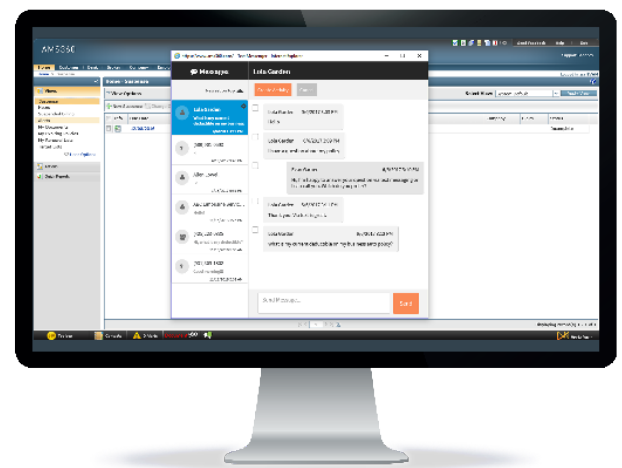
In fact, texting is the highest rated contact method for customer satisfaction, compared to all other communication channels. According to a Harris poll, 64% of consumers are likely to have a positive perception of a company that offers texting as a service channel.

Most Management Systems Don't Support Texting:

If you are like most agencies, your customers are already texting you. However, most agency management systems do not support text messaging. This results in cumbersome workarounds where CSRs use their personal cell phones to text with insureds, then take a screenshot of the text conversation, and send that image to their work email. Once the text conversation is in their email, the staff member can then attach the message to the agency management system for E&O purposes.

In addition to being clumsy, these workarounds cause other issues:

- Inconsistent process from one staff member to the next.
- Busy staff members may be unable to pay attention to incoming text messages.
- Staff members may be traveling, or sick, or on vacation.
- Employees take their cell number with them when they no longer work for your agency.
- The process isn't automated, so it may not get attached properly in the management system.



Vertafore Messenger is available for AMS360 and the Vertafore Agency Platform.

[Learn More](#)

or call 800.444.4813

Vertafore Messenger

With Vertafore Messenger, you can easily communicate the way your customers want — by text!

Stay Competitive in a Changing Market

Every time your customers adopt new technologies or services, their needs evolve. It's your job to keep up. If your services are outdated or cumbersome, customers may go elsewhere.

Easy To Use

Staff can send text messages to insureds directly from the system, rather than using their own personal mobile phone.

- When insureds send a text message, staff are notified in the management system.
- Staff can view and respond by text without leaving the agency management system.
- Replies to existing messages stay connected to the original text thread.

Reduce E&O Exposure

- All staff follow a consistent, automated process for handling text messages.
- Messages are easily saved to the management system, so the agency has a complete record of communications for E&O purposes.

Text Messages for Customer Service

Use text messaging for customer service:

- Send a "Happy Birthday" or "Happy Anniversary" text.
- If you are going to be at a community event, let your local customers know: We'll be at Booth 23 at the county fair on Friday... stop by for free popcorn and a soda, or just to say "Hi"!
- Notify customers when their policies are about to expire or when they should make updates to their coverage.

Text Messages for Sales

Text messages can improve sales results:

- According to a study conducted by Velocify, sales prospects who are sent text messages convert at a rate 40% higher than those who are not.
- Digital Marketing Magazine found that 75% of people would like to have offers sent to them via SMS.

[Learn More](#)

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