

Send the right communications at the right time to have happier clients and sell more policies

Discover how real-time connectivity and Vertafore Client Communications®, powered by ClientCircle, brings robust integrated email, campaign, and reputation management in an easy-to-manage tool. Agencies can quickly build precise segments, add thought leadership content and manage their agency's reputation to better understand at-risk revenue before they leave. Artificial intelligence ensures the right content is sent to the right person at the right time.

Agencies can send emails as needed or use the campaign tool to connect with clients at the cadence they need and track their effectiveness, letting you fine-tune your message content and frequency over time. Investing in reputation management through Vertafore Client Communications means increased customer retention, increased referrals, and stronger connections with clients.

Features you need

- **Integration with AMS360:** Real-time data synchronization means your information is always current and easy to manage
- **AI-managed communications:** Intelligently classifies which communication to send, to whom, and when
- **Net Promoter Score (NPS):** Discover your happy clients and who is likely to leave so you can reach out before it hurts your business
- **One-time communications:** Selective segmentation allows you to send timely intermittent communications to the right people
- **Email templates:** Save time drafting and designing emails through pre-authorized templates while maintaining a consistent brand standard
- **Review integration:** Improve your online reputation through collected reviews from Facebook and Google so people will read, trust, and act on them
- **Training Center:** Elegantly walks you through key workflows so you can spend less time learning, and more time connecting with your clients

- **Add-ons:** Other features include Journeys automation, websites, web chat, ImageRight integration, API access, advanced NPS analytics, text messaging, automated review collection, premium support, and handwritten cards

Industry retention research shows customers who receive two or more proactive contacts from their agency per year are **10%** more likely to stick with their current agency.

Agents who average two or more contacts per year with their customers are growing **55%** more than their counterparts who are not communicating with their customers.



“Vertafore Client Communications makes it easy for agencies to do the outreach and reputation management they should have been doing all along but haven’t had the time or resources. From happy birthdays to renewal reminders to proactive risk management advice, we can reach our clients with the right information at the right time without having to add a lot of time or more staff”

Vertafore Client Communications user

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