



# Vertafore Agency Platform™

powered by Vertafore

## One screen. Fewer clicks. Happy CSRs.

Vertafore Agency Platform™ is unlike any agency management technology you've seen. More integrated and automated than anything before, it is the most dramatic step forward in agency management in decades. You've never worked this way before.

### Increase Revenue

Acquire new customers and sell more to existing customers.

- Increase personal lines closing ratio with real-time home, auto, and flood quotes while the client is still on the phone or in your office.
- Sell more commercial lines policies with industry's most comprehensive reference tools.

### Increase Profitability

Increase your agency's efficiency with integrated technologies that reduce duplicate data entry, allowing you to sell and service more without adding staff.

- Quote, bind, and issue policies without re-keying data.
- Ensure accurate payment of benefits commission from carriers.
- Reduce training time for new staff with QuickNav™ that elegantly guide users through each step of a business process, displaying the required information and forms.

### Anywhere, Anytime Access

Whether you are on-site at a customer location or your office is closed due to a disaster, staff have secure access to the information they need to be successful, anywhere, at any time.

### Only Vertafore Agency Platform includes:

- Single solution for all lines of business: personal, commercial, and benefits.
- Advanced accounting, with no month-end processing, so books are always in balance.
- Leading publisher content enables producers to win clients and write complex commercial lines.
- Dynamic reporting to manage all aspects of the agency business.
- Agency and producer licensing to ensure staff are licensed and authorized to sell what they've quoted.
- Book personal lines faster, with real-time home, auto, and flood quotes.

"Vertafore Agency Platform has helped our agency to more than double our annual revenue—without having to hire any additional staff."

**Cam Winterburn**, *Principal*,  
*Winterburn & Associates Insurance, LLC.*

## Retain Existing Customers

Retention is one of the most important metrics in an agency.

- Service customers faster with My Agency Home, which delivers information at a glance.
- Stay current on industry trends and insurable risks with access to content from leading publishers.
- Reduce attrition with system alerts of policy changes.

### Manage Your Business.

- Service customers faster with My Agency Home, which delivers information at a glance.
- Stay current on industry trends and insurable risks with access to content from leading publishers.
- Reduce attrition with system alerts of policy changes.

### A Solution for Every Agency

There are three options of Vertafore Agency Platform to meet your needs. As your agency grows, Vertafore Agency Platform can grow with you—it's easy to upgrade to a different package.

#### Vertafore Agency Platform Essentials

For agencies that have outgrown a basic management system, this package provides the technology essentials you need to stay competitive.

#### Vertafore Agency Platform Professional

As agencies add lines of business, open additional offices, or acquire other agencies, their technology needs evolve. The Professional package is designed for these growing agencies.

#### Vertafore Agency Platform Enterprise

For agencies with complex workflows that cross multiple staff members in many different offices, we offer the Vertafore Agency Platform Enterprise.

Contact Us

or call 800.444.4813

Vertafore Agency Platform	Essentials	Professional	Enterprise
<b>P&amp;C Agency Management</b> <i>Powered by AMS360®</i> <ul style="list-style-type: none"> <li>• Accounting</li> <li>• Document management</li> <li>• Customer management</li> <li>• Policy management</li> <li>• Integration with Microsoft Office</li> </ul>	✓	✓	✓
<b>Carrier Connectivity</b> <i>Powered by TransactNOW®</i> <ul style="list-style-type: none"> <li>• Process endorsements, billing, and claims inquiries in real time</li> <li>• Enter data once when remarketing policies</li> </ul>	✓	✓	✓
<b>Carrier Downloads</b> <ul style="list-style-type: none"> <li>• Personal Lines</li> <li>• Claims</li> <li>• Commercial Lines</li> <li>• Direct Bill</li> </ul>	✓	✓	✓
<b>Customizable Dashboard</b> <i>Powered by My Agency Home</i> <ul style="list-style-type: none"> <li>• Service customers faster with this intuitive dashboard</li> </ul>	✓	✓	✓
<b>Simplified Business Processes Navigation</b> <i>Powered by Vertafore QuickNav™</i> <ul style="list-style-type: none"> <li>• QuickNav elegantly guides users through each step of a business process, displaying the required information and forms</li> </ul>	✓	✓	✓
<b>Vertafore Mobile</b> <ul style="list-style-type: none"> <li>• Service customers while away from the office</li> </ul>	✓	✓	✓
<b>Reference Library of Insurance Content</b> <i>Powered by ReferenceConnect®</i> <ul style="list-style-type: none"> <li>• Industry content from Rough Notes, IRMI, PAAS, and many others</li> </ul>	✓	✓	✓
<b>Basic Agency and Producer Licensing</b> <i>Powered by AgencyEDGE® and ProducerEDGE™</i> <ul style="list-style-type: none"> <li>• Quick and easy management of agency and individual producer licensing transactions</li> </ul>	✓	✓	✓
<b>Advanced Agency Licensing</b> <i>Powered by AgencyEDGE® Premium</i> <ul style="list-style-type: none"> <li>• Active management of agency licensing credentials</li> </ul>		✓	✓
<b>National Comparative Rating</b> <i>Powered by PL Rating</i> <ul style="list-style-type: none"> <li>• Real-time quoting for auto, home, and flood</li> </ul>		✓	✓
<b>Benefits Policy and Commission Tracking</b> <i>Powered by BenefitPoint®</i> <ul style="list-style-type: none"> <li>• Benefits customer and plan management</li> <li>• Producer commission tracking</li> </ul>		✓	✓
<b>Content Management and Best Practice Intelligent Workflows</b> <i>Powered by WorkSmart®</i> <ul style="list-style-type: none"> <li>• Advanced content management</li> <li>• Automatically direct work to the right person at the right time</li> </ul>			✓ <sup>±</sup>

\*Business Process Navigation for the Enterprise package is powered by WorkSmart ± Optional

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