

# Amaden Gay Agencies

## Company snapshot

Amaden Gay Agencies is an independent agency headquartered in East Hampton, New York. For over 100 years, they've provided insurance solutions and service to the high-net worth clients in the seasonal resort Hamptons area and beyond.

Amaden Gay prides themselves on their customer service and personal touch. As a result, they're focused on adopting technology to provide a high-end customer experience while maintaining the hometown feel that their customers value.

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**Lisa Vogeney,**

*Commercial Lines Manager,  
Amaden Gay Agencies*

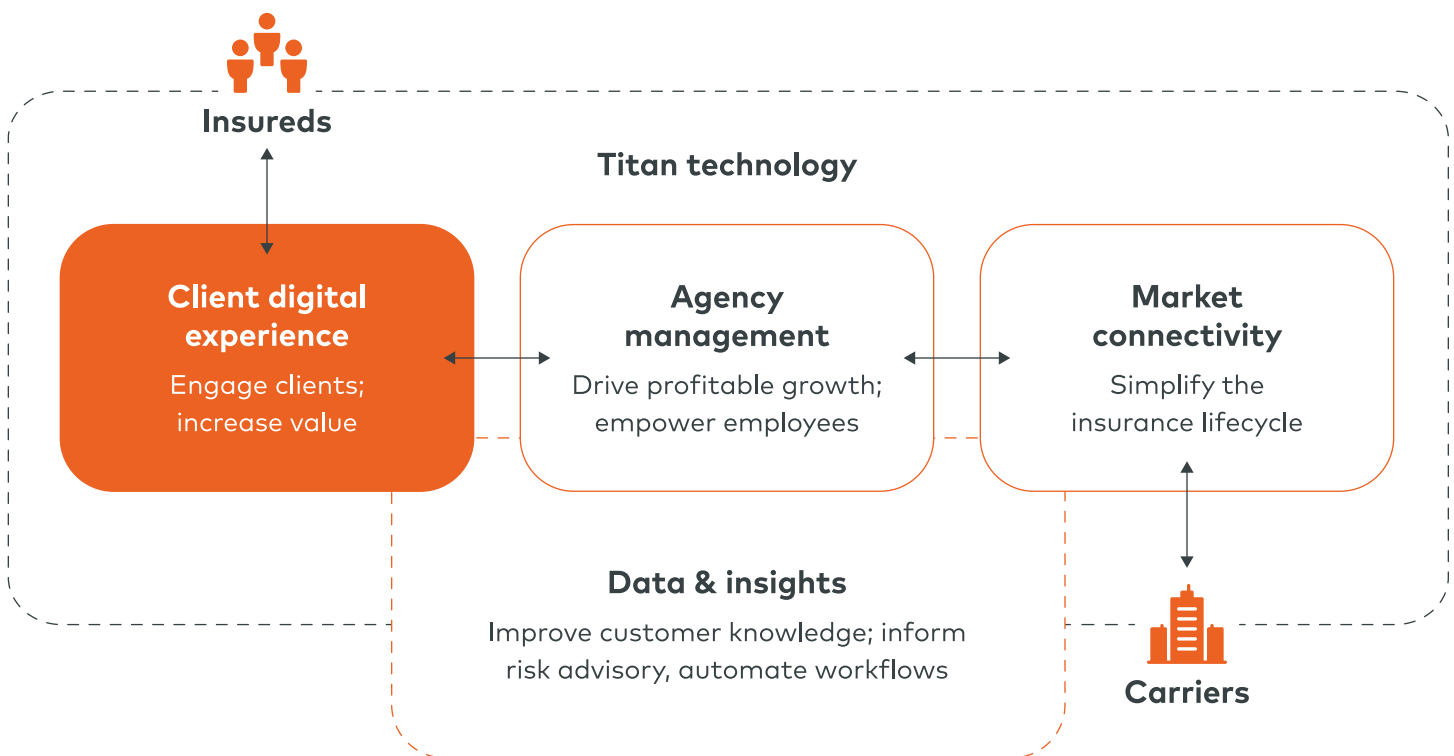
# Amaden Gay Agencies

## Vertafore solutions

InsurLink

## Proven results

- Significantly reduced time responding to simple inquiries
- Increased the security of document sharing practices
- Improved the agency-client relationship by offering self-service capabilities



Amaden Gay Agencies is focused on improving their **client digital experience**. As such, they've partnered with Vertafore to **drive client engagement** and **increase the value of their client touchpoints**.



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In 2020, Amaden Gay adopted InsurLink, shifting their technological focus from internal efficiencies to the client experience.

"We're starting to get more and more clients that prefer a digital experience – they don't want to get a paper policy in the mail anymore," says Lisa Vogeney, the agency's Commercial Lines Manager.

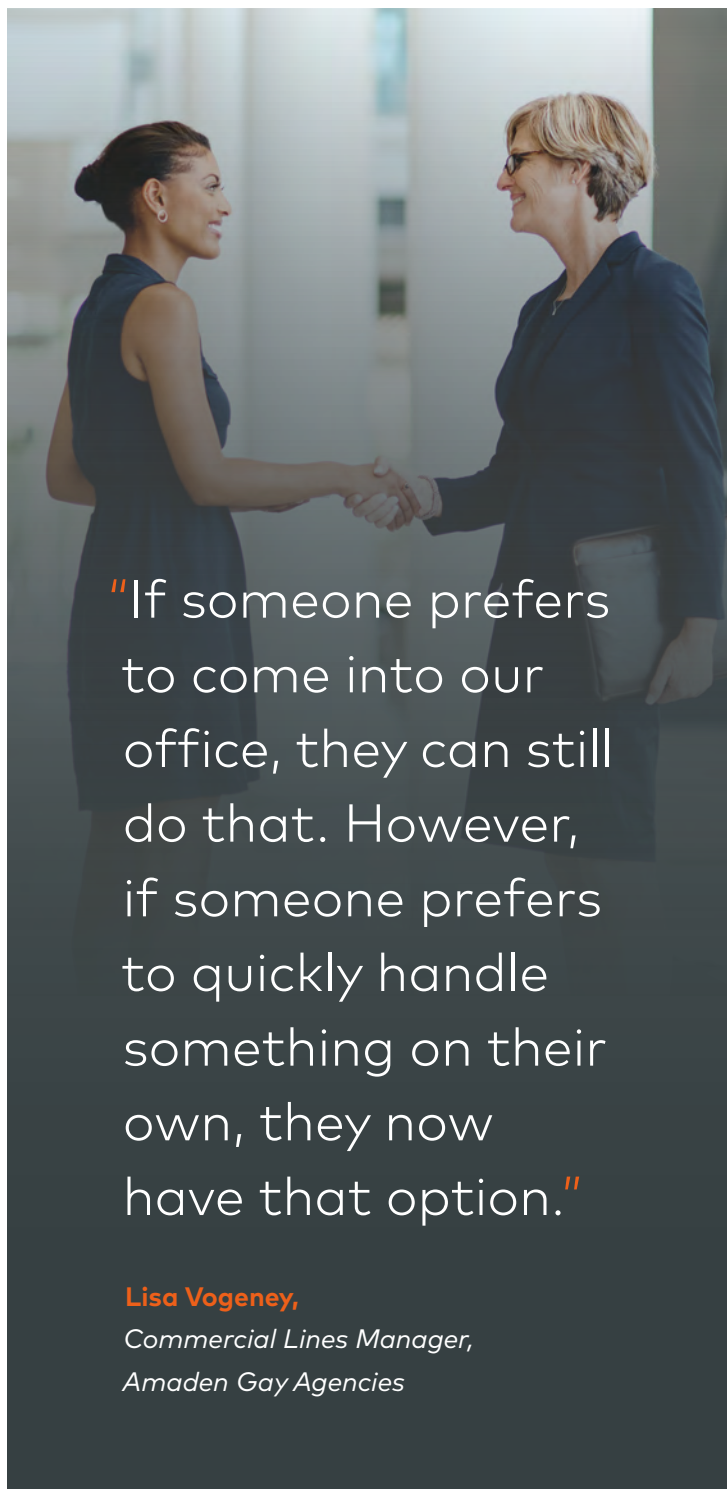
Despite Amaden Gay's rich and lengthy history, they want to continue to evolve to best meet their clients' needs. InsurLink provides exactly what Amaden Gay had been looking for: a client-facing portal that allows insureds to access everything they need from any device.

"It's really one-stop shopping for our clients," Vogeney says. "They can look at their policies, get an ID or certificate, pay their bill, whatever they need to do."

While Vogeney understands that not every customer is comfortable using an app to interact with the agency, she believes providing the option is helping develop deeper relationships with her clients.

"If someone prefers to come into our office, they can still do that," Vogeney says.

"However, if someone prefers to quickly handle something on their own, they now have that option. We try to conform to the way our clients individually want to work with us. InsurLink is flexible and allows us to have that personal touch, that individual relationship with each of our clients."



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**Lisa Vogeney,**  
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## A portal that clients love

Vogeney has received nothing but positive feedback from her customers using InsurLink. "Every one of my clients loves it," Vogeney says. "It's minimalistic, easy to use, and easy to navigate."

A client favorite is the Insurance Summary View which gives the insured a simple overview of all their policy information. In the past, Amaden Gay had to mail enormous policies – sometimes hundreds of pages long – to their customers. InsurLink allows the agency to safely and securely share policies in a fraction of the time in a beautifully simplistic format.

"If you consider the toll it takes on the photocopier, the amount of paper, the postage... Not only are we saving time, but we're saving money," Vogeney says.

"Every one of my clients loves it. It's minimalistic, easy to use, and easy to navigate."

**Lisa Vogeney,**

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# Workflow without InsurLink

Amaden Gay mailed policy information to clients



**1**

Client renews a policy



**2**

Agent goes to carrier to retrieve the policy



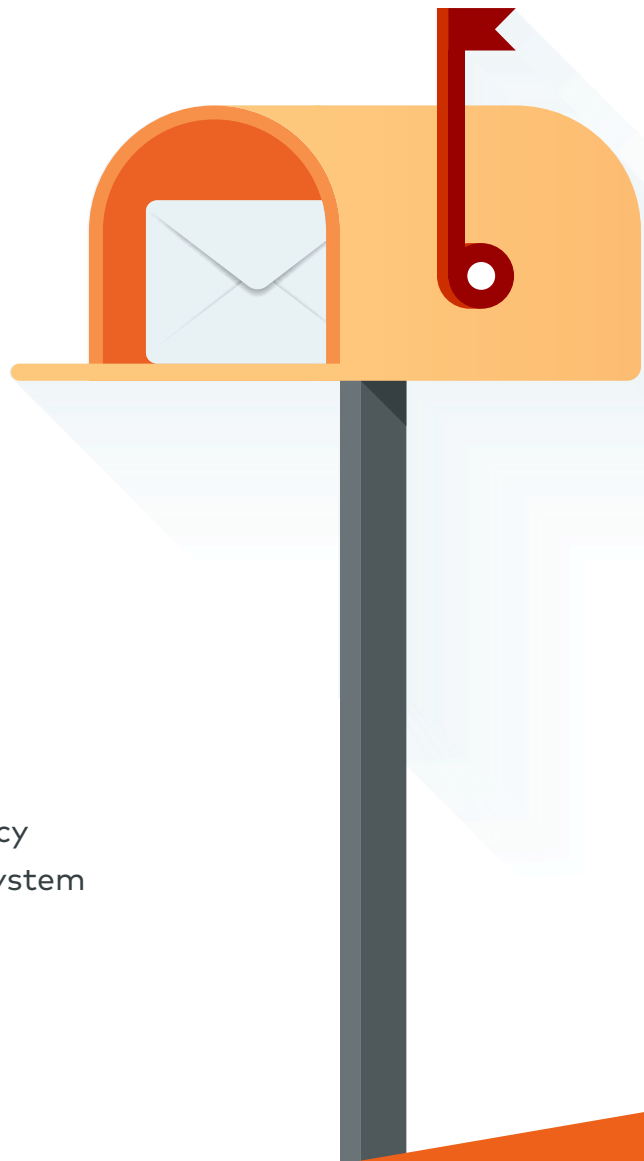
**3**

Agent saves policy, prints it, and sends to the client



**4**

Agent makes a record of the policy being sent in the management system



**TOTAL TIME: 1 HOUR**

# Workflow with InsurLink

Amaden Gay shares policy information through InsurLink



1

Client renews a policy



2

Agent quickly accesses the policy, right clicks, and securely sends the policy to InsurLink



3

Client logs in to InsurLink to view their renewed policy information

Instead of trying to manage back-and-forth emails with clients, Vogeney can share a policy and simply move on. "I'll send it over, get on with my day, and then I'll receive an email alert saying, 'You sent this' or 'So-and-so dropped this in', so it's a nice reminder," **Vogeney says.** "InsurLink is like my own personal assistant."

**TOTAL TIME: 5 MINUTES**

## Effortless set-up and integration

Amaden Gay has work to do and clients to service – the last thing they need is another system to configure.

Luckily for them, InsurLink requires absolutely no configuration. All Vogeney had to do is send a bulk invite to her customers with a login. From there, they have immediate access to the portal from all their devices.

"I'm not technologically adept, not in the least," Vogeney says. "But InsurLink works right out of the box. We didn't make any changes."

More importantly, InsurLink integrates with the agency's existing solutions, so any updates in the management system are reflected in InsurLink and vice versa. This eliminates any duplicate data entry and ensures that the information clients access is completely accurate.

"We're all about saving steps and saving clicks and InsurLink automates a lot of those steps for us," **Vogeney says.**

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## Innovative solutions for the modern agency

Insurance is evolving: The industry is quickly consolidating, as client expectations grow, and technology creates new opportunities. The key is staying ahead to remain relevant and profitable. If you're unsure how to move forward in this evolving landscape, Vertafore is here to be your partner and guide you through these changes.

### Ready to take the next step?

Contact us to learn more about how Vertafore can help you provide your clients with the digital experience they expect.





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