

Levy Insurance Agency

Company snapshot

Levy Insurance Agency is a family-owned agency in Williston, Florida who's been providing commercial, home, auto, and life insurance to Florida's heartland since 1997. As Agency President Trey Tinney would tell you, thriving as a business for over 20 years doesn't come from complacency. It requires a readiness to adapt.

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Trey Tinney,
President,
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Vertafore Solutions:
QQCatalyst

Proven results:

- Eliminated paper to provide an improved customer experience
- Standardized processes to increase productivity and boost profitability
- Significantly reduced E&O exposure with real-time documentation



When Trey Tinney was brought into the family business as a producer, he immediately noticed an incredible roadblock. The agency was buried in paper. Business processes were sluggish. Customer information: disorganized. And employees: exhausted.

"We have almost 4,000 clients and 8,000 policies in force," Tinney explains. "That's a lot of files." Files stored in cabinets throughout the office created a storm of paperwork. Employees played a game of musical chairs, standing up and sitting down, scouring the office in search of customer documentation. This resulted in frustrating hold times and a suboptimal customer experience.

"We're more efficient, but we're also less likely to lose information because everything is documented in real-time. We know exactly who made changes to a document and when."

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A perfect fit

Fast-forward to 2018: Tinney, now agency president, wasn't satisfied with the legacy technology they had implemented to move past the paper age. He continued to look for something better. After careful consideration, Tinney decided that QQCatalyst was the best option to transform Levy into a modern agency.

"It's allowed us to get everybody following the same processes and protocols," he says. "With QQCatalyst, you know where your day starts when you sit down. Our staff can see the work they started on, what needs to be finished, and what they need to work on next."

The team has a holistic view of their individual tasks on their dashboard such as upcoming renewals, time-sensitive

requests, and reminders that require attention. Most importantly, they're spending time completing tasks — not hunting down paper documents.

Not only has Levy been able to vastly improve productivity with QQCatalyst, but they are better protected from E&O exposure. There's no more anxiety over losing a document or customer communication because it's all logged directly on the customer's account.

"We create notes and tasks within the system instead of pulling files," Tinney explains. "We're more efficient, but we're also less likely to lose information because everything is documented in real-time. We know exactly who made changes to a document and when."

Going paperless was a feat on its own, but Levy needed more than just digital record-keeping. From quick employee onboarding to complete agency oversight, **QQCatalyst does it all**. Levy vastly improved both the customer experience and employee satisfaction in one fell swoop.

Better onboarding

It used to take weeks to get a new employee up and running. That changed with QQCatalyst.

"When I worked for another agency, our new hires were deterred by the clunky management system we were using," Tinney describes, "It was just too hard to wrap your head around. QQCatalyst, on the other hand, is very user friendly. We had a new team member join us with no background in insurance or management systems. She picked it right up."

Better outreach

Creating meaningful touchpoints with all 4,000 of Levy's clients used to be nearly impossible. Now, thank-you notes and birthday wishes are automatically sent to customers with pre-built email templates. The system also sends reminders on a regular cadence to keep Levy top of mind during coverage renewals. Producers can even create automated cross-sell campaigns that target customers who are likely to purchase another policy.

Better operations

Tinney needed a solution that could handle his personal and commercial business. QQCatalyst handles both with ease. Tinney says, "QQCatalyst isn't just for personal lines. It's a great platform to help you document and keep track of any business. QQCatalyst creates a beautiful proposal and you can set up widgets on your dashboard to get on top of expiring coverages."

Better oversight

"I've never been a micromanager," Tinney says. "So having a tool to assist me in managing my staff has been invaluable." QQCatalyst has sales pipeline and employee productivity tools built into the system, allowing Tinney to obtain a birds-eye-view of the business. He adds, "I can compare my employees' performance to see if anyone needs help and review opportunities in our pipeline to make sure we are on track." Tinney's agency prioritizes growth, and QQCatalyst makes it easy to make informed decisions to foster their business goals.

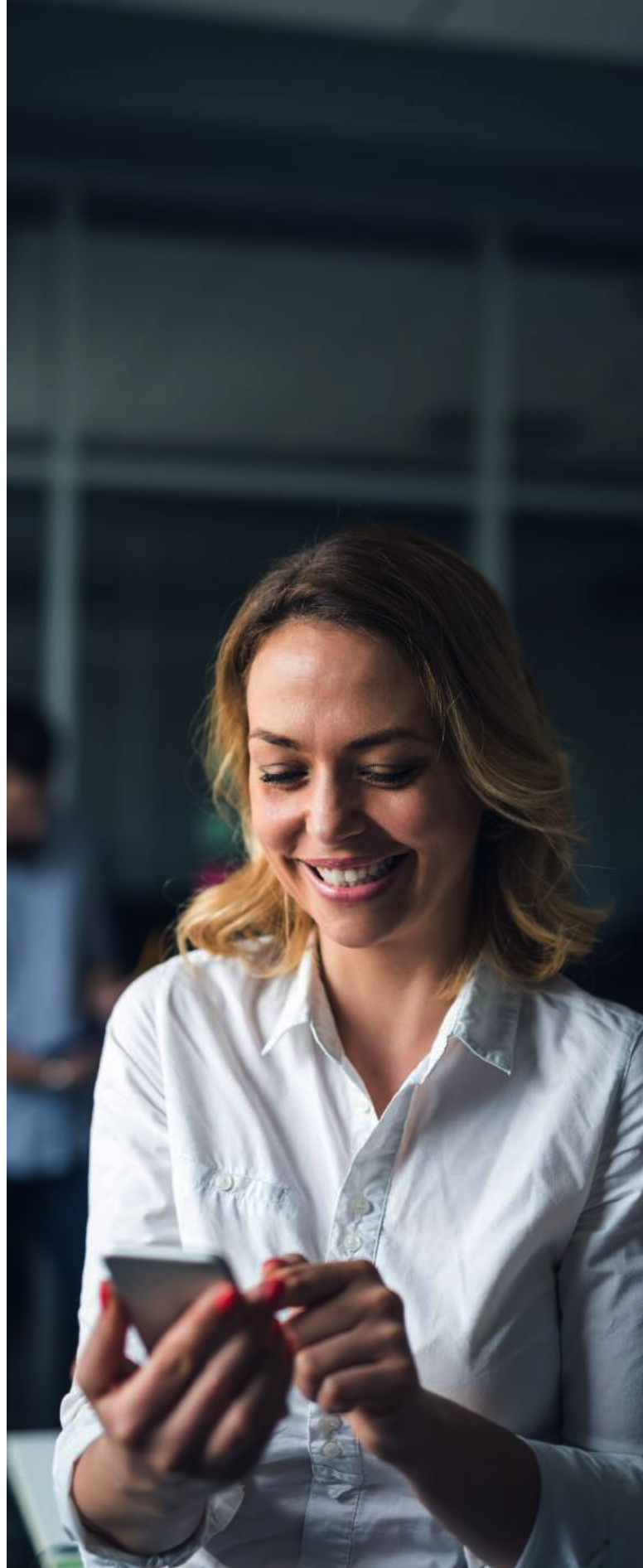
Keeping in touch

Most of all, Tinney believes Levy's strong customer relationships are the key to their continued success. And what's the most important component of any relationship? Communication.

Tinney explains, "The easier it is to communicate with your client and your agent, the better the relationship. Offering texting to our customers gives them that additional option of communicating with us how they want."

Before QQCatalyst, customers would text Tinney's personal cell, a chaotic process where information was often lost. Now, all communications — including texts — are neatly logged on the customer's account. It's a win-win: Levy's customers enjoy the ease of communication with their agency and Levy can be confident that they're protected from E&O risks.

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Workflow before QQCatalyst

Levy struggled to keep accurate documentation of text messages with their clients.



1

A customer texted an image of their car to Tinney's personal cell to initiate a claim



2

Tinney screenshot the text and emailed it to himself



3

Then, Tinney printed the document and placed it in a filing cabinet for future reference

Workflow after QQCatalyst

Texts are automatically documented on the customer's account.



1

A customer texts an image of their car to Levy's agency phone number to initiate a claim



2

The inbound text is automatically attached to the customer's file for future reference



3

Levy can quickly reference back to the text and significantly reduce E&O exposure

More than a software vendor

Levy takes pride in their customer service and they wanted to work with a software company that does the same. In the rare scenario that Tinney does need help with an issue, Vertafore is always fast and friendly. "I call Vertafore, two seconds later they remote in, and boom, the problem is fixed, and we move on," Tinney says. "Our issue is always expedited and corrected immediately."

Tinney also appreciates that for a company of Vertafore's size and resources, he often speaks to the same representative who understands his business and is eager to help him. Tinney says, "We're building relationships with Vertafore, which is nice for a company their size."

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Built with you in mind

The insurance industry is constantly evolving. In a market changing as fast as ours, the agencies that thrive will be the ones that embrace new technology and use it to their customers' advantage.

QQCatalyst offers simplified client and policy management, built-in sales and marketing automation, and effective employee productivity tools enabling you to build stronger relationships and manage your business more effectively.

[Learn more](#)





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

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