

BEVCO Insurance

Company snapshot

BEVCO Insurance, located in Lugoff, South Carolina, takes pride in being the insurance agency that can take care of all their clients' needs—providing homeowners, auto, and life insurance in South Carolina, North Carolina, Georgia, and Florida. Since owner Beverly Scott took over, the agency transitioned from operating out of filing cabinets and paper files to utilizing a modern management system that has enabled growth and retention, driving success for their agency.

"When I happened upon your product, it just clicked for me. It made sense. The interface was easy to understand immediately. It was intuitive. And that's the part that really hooked me."

Teresa Fuller,
COO and Vice President,
BEVCO Insurance

BEVCO Insurance

Vertafore solutions

QQCatalyst

PL Rating

Orange Partner Program

Proven results

- Eliminated the need for paper files and filing cabinets
- Standardized processes, allowing for more time to sell to clients
- Increased efficiency utilizing the Vertafore Orange Partner Program

QQCatalyst:

Easy to use and accessible

When Beverly Scott purchased the book of business for BEVCO insurance, she and COO and Vice President Teresa Fuller were quickly tasked with searching for a management system to replace the filing cabinets and mounds of paper documents in the office. Both were instantly drawn to QQCatalyst for its ease of use and adoptable interface. Coming from a background in software, Teresa knew she wanted a system that allowed her to focus on insurance instead of the technology.

QQCatalyst changed the way BEVCO does business by streamlining their daily processes and consolidating all the information needed to service their clients into a single platform. More importantly, this past year, QQCatalyst allowed their employees to work remotely when necessary throughout the pandemic. Being able to access files online rather than searching through filing cabinets in the office enabled the team to continue business uninterrupted.



In the insurance industry today, there has been a dramatic shift to remote work. In order to adjust to this new norm, agencies need a management system that allows them to operate in a work-from-home environment. QQCatalyst enables employees to continue to service their clients from a variety of locations as if they were in the office and allows employee productivity to remain consistent. Because of QQCatalyst, BEVCO Insurance has the confidence that their business will continue to succeed despite whatever interruptions may come.

"Because of QQCatalyst, we have the flexibility to keep churning out quotes, selling policies and working seamlessly from any location," Beverly says. "And with the integrations available, we have been able to use mobile applications, working as if we were in the office. All of these systems in place have made all the difference in the world."

Free up time to sell to clients

Independent agencies need the ability to focus on what matters most: selling to and servicing their clients. QQCatalyst helps employees save time by automating daily processes so that employees can work more efficiently. With its integration capabilities, employees can use texting and email automation features to communicate with clients while recording necessary information in real time. QQCatalyst also directly integrates with DocuSign, enabling employees to send files for signature and then upload them directly into the system, consolidating information into one place that is easy to navigate.

Because of these capabilities, Beverly and team have more time to focus on selling to their customers in a timely manner and creating a positive client experience. Since implementing QQCatalyst, they have grown around \$250,000 in premiums, which they attribute to the amount of time QQCatalyst has given back to them to focus on their clients' needs instead of using paper processes. As Beverly noted, "Before, we used to have reams and reams of paper because we printed everything out. Now we save everything as files, we attach it into QQCatalyst, and we can send everything to DocuSign through the system. We can text through QQCatalyst, and we have the ability to send quick email files through the system. It has changed our lives."



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Beverly Scott,
Agency Owner,
BEVCO Insurance



Workflow before QQCatalyst



1

Client comes in or calls the office requesting information on their policy



2

No tracking system to know if they have called in before or who they talked to



3

Employees run to the file cabinets located in the office



4

Search each carrier file for the client's name until they are located

TOTAL TIME:

3-5 DAYS to complete the entire workflow for new policies, renewals, or endorsements.

Workflow after QQCatalyst



1

Client calls or comes into the office (even without appointment)



2

Employees can look up the client in QQCatalyst



3

QQCatalyst displays a snapshot of their policies, limits, etc.



4

Run the policy and cross-sell or up-sell the client instantly

TOTAL TIME:

MINUTES to complete the entire workflow for new policies, renewals, or endorsements.

Orange Partner Program

Vertafore's Orange Partner Program brings together complementary solutions with best-in-class capabilities to the Vertafore suite of products. With the Orange Partner Program, customers can take advantage of utilizing these solutions through integrations using available APIs.

BEVCO Insurance utilizes Vertafore's Orange Partners to automate its communication with clients throughout the entire client journey. By using DocuSign, the team is able to automate how they prepare and manage agreements, servicing their clients electronically from various devices and locations. For CRM capabilities, BEVCO utilizes both Bridge by The Kotter Group and AgencyZoom to quickly communicate with clients while also automating time-consuming tasks. During the pandemic, Bridge by The Kotter Group allowed Beverly and team to operate remotely utilizing the phone app while continuing to keep their business running as normal.

DocuSign®



Agencyzoom

As the Insurance industry continues to evolve and customer expectations are changing, the key to remaining relevant and profitable lies in embracing modern technology. QQCatalyst is the modern management system for independent agencies that automates your workflows and daily processes, allowing you more time to service your customers and grow your book of business.

Vertafore is here to be your partner and guide you through this evolving landscape. Contact us to learn more about how we can help you drive growth for your business.





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