How difficult is Vertafore Client Communications to set up?

Most agencies can get up and running in under 30 minutes. Using the Learning Center, most agencies can have their first campaigns started in under an hour or two.

Who is eligible for Vertafore Client Communications, and what does it cost?

AMS360 users on a Core or VAP package using VSSO are eligible for Vertafore Client Communications at no cost.

What information is synced with AMS360?

Policies, Custom Fields, Contact, Activities, and Suspenses.

How many contacts am I allowed to have?

There is no limit to the number of contacts.

What training is needed to use Vertafore Client Communications?

No instructor-led training is required. The Training Center is built into the app to get you from new user to rock-star.

Do all employees need to use Vertafore Client Communications?

No. In fact, we recommend that only a subset of users manage Vertafore Client Communications. They can set up communications on behalf of the rest of your team.

How can we get Vertafore Client Communications?

Contact your account manager.

Can we add additional Rocket Referrals services to Vertafore Client Communications?

Yes! There are several discounted packages available that can be purchased in-app. These include text messaging, automated review collection, premium support, and handwritten cards.

How do automated engagements in Vertafore Client Communications appear in AMS360?

You can configure which campaigns and activities create records in AMS360.

How do customers receive NPS?

Email or text.

Can customers opt out of communications?

Yes. They can opt out of campaigns directly from the communication. The only exception is for one-time communications, as those are expected to be immediately relevant, like hailstorms.

Can links, blogs, and logos be embedded into email communications?

Links and links to blogs can be embedded. An agency logo can be added to the communications, but you cannot drop in other image files.

Are contacts synced in real time, or do lists need to be ran regularly?

Contacts are synced in near-real time. Usually under five minutes.

Does Vertafore Client Communications track email open rates?

It does; but we don't recommend tracking that, as most email programs block the mechanism that report opens.

Can we create our own templates?

Yes!

How many agency users can we have?

As many as you'd like, up to the total number of named AMS360 license holders.

Can Vertafore Client Communications be set up by agency branches?

Yes. In Integration Settings, you can choose which divisions, branches, groups, etc. you would like to integrate.

Can social media accounts be embedded into emails?

Yes. There is built-in functionality for that.

When can we start using Vertafore Client Communications?

Right now!