featured customers

Insurance Agency Management Software Category

FALL 2026
Customer Success Report





Insurance Agency Management Software Category

Insurance agency management solutions assist insurance agencies to efficiently handle their business. These tools offer the features of marketing automation and CRM platforms to enable agents to improve relationships with their prospects and customers. Further, these systems include back-office functionalities like commission processing and automated workflows to improve agent efforts.

You can implement insurance agency management software across all branches of your insurance agency or deploy it on a case-by-case basis. With this product, you can monitor your agency's sales performance, enhance its sales and marketing campaigns, and maintain close relationships with your clients. You can deploy it as a standalone platform or as the base for combined insurance suites.

Customer Success Report Ranking Methodology

The FeaturedCustomers Customer Success ranking is based on data from our customer reference platform, market presence, web presence, & social presence as well as additional data aggregated from online sources and media properties. Our ranking engine applies an algorithm to all data collected to calculate the final Customer Success Report rankings.

The overall Customer Success ranking is a weighted average based on 3 parts:

CONTENT SCORE

- Total # of vendor generated customer references (case studies, success stories, testimonials, and customer videos)
- Customer reference rating score
- Year-over-year change in amount of customer references on FeaturedCustomers platform
- Total # of profile views on FeaturedCustomers platform
- Total # of customer reference views on FeaturedCustomers platform

MARKET PRESENCE SCORE

- Social media followers including LinkedIn, Twitter, & Facebook
- Vendor momentum based on web traffic and search trends
- Organic SEO key term rankings
- Company presence including # of press mentions

COMPANY SCORE

- Total # of employees (based on social media and public resources)
- Year-over-year change in # of employees over past 12 months
- Glassdoor ranking
- Venture capital raised

Award Levels



MARKET LEADER

Vendor on FeaturedCustomers.com with substantial customer base & market share. Leaders have the highest ratio of customer success content, content quality score, and social media presence relative to company size.



TOP PERFORMER

Vendor on FeaturedCustomers.com with significant market presence and resources and enough customer reference content to validate their vision. Top Performer's products are highly rated by its customers but have not achieved the customer base and scale of a Market Leader.



RISING STAR

Vendor on FeaturedCustomers.com that does not have the market presence of Market Leaders or Top Performers, but understands where the market is going and has disruptive technology. Rising Stars have been around long enough to establish momentum and a minimum amount of customer reference content along with a growing social presence.

2026 Customer Success Awards

Check out this list of the highest rated Insurance Agency Management Software based on the FeaturedCustomers Customer Success Report.



Applied
IPIPELINE
Vertafore
ZYWAVE



AgencyBloc
EZLynx
INSLY
JENESIS The Agency Advantage
majesco
momentum by NowCerts
Novidea
socotra



ClientCircle
GLOVEBOX
HAWKSOFT
VRC INSURANCE SYSTEMS

* Companies listed in alphabetical order



2026

INSURANCE AGENCY MANAGEMENT SOFTWARE

MARKET LEADER

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ABOUT APPLIED SYSTEMS

Applied

Applied Systems® is the current that connects insurance. As the world's largest provider of insurance software, Applied connects agencies, brokers and carriers across the global flow of risk, orchestrating data, intelligence and action at every connection. As those connections multiply, value compounds – powering a smarter, faster and more connected insurance industry that serves as a foundation for vibrant economies where more businesses, communities and dreams can move forward.

356 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"I would say, for any agent looking to Applied Pay, the answer is very simple. Just do it. You will be amazed at the time that it saves your service team, that it saves your accounting department, and also how your customers are going to absolutely love the security and the ease of being able to use it."

SHANNON BROWN
ASSISTANT TREASURER, SNELLINGS WALTERS INSURANCE AGENCY

"I love Epic Browser and have had a very enjoyable experience with our Applied platforms. Being able to integrate these platforms has created a level of connectivity that saves us time and makes our staff more efficient so that our small but mighty team can operate with the efficiency of a larger agency."

LISA ANTHOFER
OPERATIONS MANAGER, SKOGMAN INSURANCE

"Tarmika saves our agency a lot of time. When we were going to quote before we adopted Tarmika, we would spend two to three hours quoting a multi-line account. Our account managers can now do that within an hour and have at least three to six different quotes."

KRISTIN BAKER
CHIEF RISK OFFICER, ROLLO INSURANCE GROUP

"Applied Pay checks all the boxes. That makes it the easy choice."

RAJ KALAHASTHI
CHIEF DIGITAL & INFORMATION OFFICER, THE BALDWIN GROUP

TRUSTED BY

SeaMountain INSURANCE · BRAVERA INSURANCE · CAA Combined Agents of America, LLC · Rollo INSURANCE · SKOGMAN INSURANCE



ABOUT IPIPELINE

iPipeline leads the industry in providing the next-generation suite of sales distribution software to the insurance and financial services markets through its on-demand service. iPipeline's channel solutions for carriers, distributors, and financial institutions automate activities for health class estimation, CRM, forms distribution and processing, quotes and illustrations, e-Applications, agency management, data services, policy delivery and policy holder services, enabling the entire industry to market, sell, and process faster. iPipeline provides the process automation and seamless integration needed on a global basis...

45 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"iPipeline's iGO e-App software and associated products are a success story at Southern Farm Bureau Life. Our agents are realizing sales efficiencies that they simply have not had in the past. Our placement rate is currently in the ninety-seven percent (97%) range for all newly issued policies in 2013. Our Home Office operations are realizing new business processing efficiencies that are simply stunning."

RICK MCKISSACK
DIRECTOR OF PROJECT MANAGEMENT, SOUTHERN FARM BUREAU LIFE INSURANCE COMPANY

"Partnering with iPipeline, and specifically the InsureSight product, has allowed us to gain valuable insight into our comparison of traditional vs. accelerated underwriting. We've been able to establish a consistent answer to the question of 'what's slowing things down?', stop playing the blame game, and get a better grasp on just what exactly we're getting from a particular vendor."

CARRIER CUSTOMER
DIRECTOR, LIFE OPERATIONS

"Crucial adjustments made along the way include simplifying application forms and ensuring a paperless enrollment process."

JUSTIN STEPHANI
ERIE INSURANCE

"DocFast and e-policy delivery have become our most requested tools over the past few years!"

BILL LEVINSON
FOUNDER AND MANAGING PARTNER, LEVINSON & ASSOCIATES

TRUSTED BY

Edward Jones MAKING SENSE OF INVESTING · OneAmerica · Conventus Now · Premier Brokerage Services, A Gallagher Company · MAX my interest.

2026 INSURANCE AGENCY MANAGEMENT SOFTWARE MARKET LEADER

ABOUT VERTAFORE

Vertafore

Vertafore is the leader in modern insurance technology and serves more industry customers across all parts of the insurance distribution channel than any other InsurTech company. With solutions for agencies of all sizes, carriers, MGAs, MGUs, state governments, and educational institutions, no other technology partner offers more options to connect members of the insurance industry with one another and keep their businesses running smoothly. Whether it's agency management systems, ratings and connectivity, regulation and compliance—and more—Vertafore is leading the way and delivering results that make a...

188 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"Vertafore Client Communications makes it easy for agencies to do the outreach and reputation management they should have been doing all along but haven't had the time or resources. From happy birthdays to renewal reminders to proactive risk management advice, we can reach our clients with the right information at the right time without having to add a lot of work or more staff."

DEAN GIEM
PRESIDENT, PARADOX INSURANCE AGENCY

"Since implementation, [Vertafore] has enabled us to examine every broker compensation arrangement in place, identifying out-of-date incentive programs and recognizing cases where broker commissions were not leveraging the desired business result."

LARGE HEALTH CARRIER COMPANY

"The change Vertafore has made where I have a contact and each of my agents has a contact has been amazing."

NIKKI TOON
CHIEF OPERATING OFFICER, COMBINED AGENTS OF AMERICA

"We've never run into something we can't solve with MGA Systems."

STEVEN COTA
CHIEF INFORMATION OFFICER, DUAL GROUP

TRUSTED BY

ONE80 INTERMEDIARIES · CONNOR INSURANCE AGENCY · Harbor Insurance Brenn Agencies · PARADOX Insurance Agency · Bailey Family Insurance



ABOUT ZYWAVE

ZYWAVE

Zywave is a leading provider of software-as-a-service (SaaS) technology solutions for the insurance industry. The company's products include web-enabled marketing communications, business intelligence and analytics, client resource portals and agency management tools. More than 3,500 brokerages worldwide-including more than 90 of the top 100 U.S. insurance firms-use Zywave's proven solutions to differentiate themselves from the competition, enhance client services, improve efficiencies and achieve organic growth.

96 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"Business owners need an insurance service that not only meets their needs, but provides an easier platform for purchasing and managing coverages – and that requires modern insurance technology like (Zywave's) ClarionDoor."

JIM TYGH
CHIEF ACTUARY AND RISK OFFICER, LIO INSURANCE

"Zywave support is one of its biggest values. I've felt the sting with other vendors leaving me in the dust after implementing their tools, but not with Zywave. Their support teams are phenomenal, second to none."

FRANK MAYER
CORNERSTONE GROUP

"Their relief was incredible with MyWave Elements. The client couldn't stop thanking us!"

SHANNON
PROGRAM COORDINATOR, THE RICHARDS GROUP

"Within six months we had the volume to pay for the API. It pays for itself quickly."

JOHN WHEATLEY
REDWOOD CREDIT UNION

TRUSTED BY

ROLAND BARRERA FOR CITY COUNCIL AT-LARGE · LIO · Redwood Credit Union · THE FAWCETT GROUP · BENEFICIAL SOLUTIONS an employee benefit consulting group



2026

INSURANCE AGENCY MANAGEMENT SOFTWARE

TOP PERFORMER

featured customers



ABOUT AGENCYBLOC

AgencyBloc

AgencyBloc is the #1 Recommended Insurance Industry Growth Platform that serves the health, senior, and benefits industry with a suite of solutions that can be strategically utilized to support the operational and growth needs of independent insurance agencies, GAs, IMO/FMOs, call centers, and carriers.

420 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"From tracking commissions to saving notes on prospective and current clients, AgencyBloc has it all. We had been paying commissions to our LOA agents through an Excel spreadsheet. As our agency grew, this process became tedious and riddled with missed commissions. With AgencyBloc, we're saving time, which saves money, and we couldn't be more pleased with our decision."

DEBBIE R.
CORNERSTONE SENIOR ADVISORS

"With AgencyBloc, we can finally reduce 3 separate applications we were using into one! Our previous CRM was only available to admin staff. Opening access to our agents with AgencyBloc is extremely helpful and has been a timesaver for our admins. AgencyBloc Support always replies with excellent answers, and I receive a response within a day!"

SARA T.
STRONG FAMILY FINANCIAL

"I enjoy using AgencyBloc, and they have helped automate much of the administrative and client onboarding activities with my practice. I would highly recommend them!"

JUSTIN C.
THE MEDICARE HELP DESK

"I truly love AgencyBloc as it has replaced my book of business calendar, provided me ways to keep track of client information, and much more!"

DAVID J.
ARISON - FERENCE INSURANCE SERVICES

TRUSTED BY

Insurance Solutions of the South

Elite Choice AGENCY



ABOUT EZLYNX

EZLynx

EZLynx® develops industry-leading cloud-based software for the insurance industry. EZLynx software has helped independent agents operate their businesses more effectively for over ten years. EZLynx is proud to be the innovators of several products that, previously, the insurance industry had never seen, including: Real-time rating, Agency Pulse™, Policy Sync, eSignature integration, and a unified rating and management system.

69 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"And I've got to tell you, EZLynx was there every step of the way. Everything that EZLynx promised I would get, I got it, and better. With EZLynx I really feel a partnership; it feels like we were meant to do business together."

PHIL KLEIN
PHIL KLEIN INSURANCE GROUP

"I chose EZLynx because they checked all my boxes. I had the chance to shop around, but no one else offered the complete picture. They're affordable, value relationships, and are ready to grow with you."

EMILY WYCPALEK
CO-FOUNDER, GROUND UP INSURANCE

"If I had to describe EZLynx in one word, I would probably say unified. It's one, unified platform that an agency can go to and find solutions for whatever their agency needs."

LUKE ROYAL
SMART CHOICE MIDWEST REGIONAL DIRECTOR, SMART CHOICE

"I love EZLynx as my tech partner because of the ease of use and support I get from using it."

JAMIE BOWDEN
VICE PRESIDENT OF TRAINING, AGENTS UNITED

TRUSTED BY

MAUCERI BYNUM INSURANCE · B&B Insurance Services · HHC Hibbs ♦ Halimark & Company INSURANCE · GROUND UP INSURANCE · HARDEE INSURANCE GROUP



ABOUT INSLY

INSLY

Insly is on a mission to give every insurer and broker access to enterprise-grade software, without the financial risk of prohibitive upfront costs or long implementation cycles. Founded in 2013 by Risto Rossar, Insly combines deep insurance expertise with flexible, modular technology designed around the needs of MGAs and insurers. Its solutions span the entire insurance lifecycle - from product development and underwriting to finance, accounting, and AI innovation. Fast to implement and priced for growth, Insly helps insurance businesses scale with confidence.

68 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"My company is not one of many. I have known the insurance market for over 20 years, I was the Vice President of the Management Board of many companies, that's why my knowledge and experience are the biggest assets of my company."

ZBIGNIEW ZIELIŃSKI
OWNER, ZZ BROKERS

"We chose to partner with Insly, because they could build as a trading platform that's fully in line with our strategy - allowing the broker to control their sales and operations."

SCOTT BROWN
MANAGING DIRECTOR, ACCELERATE UNDERWRITING LIMITED

"Working with Insly in the field of IT development is superior experience as they have very good insurance intermediation business DNA inside."

RADU BURGHELEA
CHIEF OPERATING OFFICER & CHIEF EXECUTIVE OFFICER, AON

"Insly provides a spectacular combination of IT and policy administration services that we can really rely upon. They work really hard to keep their service on top level."

SILVER KUUS
CHEIF EXECUTIVE OFFICER, NORDEA

TRUSTED BY

Field Insurance Brokers Inc. · 1st first insurance · UKIS UK Insurance Solutions Ltd. · SHORE Underwriting · ALTA SIGNA



ABOUT JENESIS SOFTWARE

Jenesis Software creates enterprise-quality Agency Management System Software for the Insurance Industry. Jenesis Agency Management System features built-in marketing campaigns for prospecting and retention, quote management, real-time company policy inquiry, company downloads, integrated credit card processing with no fees to the agent, commission tracking, Acord forms library, imaging, and document management, receipting and end-of-day balancing, interoffice email, and supports personal and commercial lines. Jenesis also offers fully optimized agency websites featuring prime Google ranking results with capabilities such as links to...

36 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"Jenesis Software allows our insurance agency to do things for our customers very quickly. If a customer calls us on the phone, we can have an answer for them within 60 seconds. We don't pull a file like we did in the past. With the Jenesis agency manangement system, we've got everything for a customer right in front of us. If the customer wants to make a payment, the process is so easy that he/she is only there for a couple of minutes. Everything you need to service a customer is right in front of you in seconds. Jenesis saves our agents and our customers time."

LEE CRISP
SUMMIT INSURANCE

"Jenesis software is the best purchase that I have made for our agency. The system is a very user friendly system, it has all the features that an insurance agency needs to run, from scanning of documents to policy screens. It will make your agency become efficient in every way to help you keep in touch with your customers and your daily routine. I recommend this system to any insurance agency."

JIMMY BARNETTE
OWNER, BARNETTE AND COATES INC

"Well, I give them a 12 out of 10. Phil did everything that we asked and then some, and in such a short amount of time. We have had such a great response from this new website. I just wish that we had done this sooner."

JENNIFER ELLIOTT
PARTNER, A1 INSURANCE COVERAGE

"The website has been absolutely divine I love Phil's dedication, ease and flexibility! He is an absolute joy to work with! On the scale of 1-10 I would give Phil a 10."

DEIRDRE RUSHIN
CEO/PRINCIPAL AGENT, IMPERIAL INSURANCE AND FINANCIAL SOLUTIONS

TRUSTED BY

ROSEMARY A LAMBERT CPA, PA · A1 Insurance Coverage · Hadley Insurance Group, LLC · Palmetto Bluff · That Insurance Guy.net



ABOUT MAJESCO

majesco

Majesco (NASDAQ: MJCO) provides technology, expertise, and leadership that helps insurers modernize, innovate and connect to build the future of their business – and the future of insurance – at speed and scale. Our platforms connect people and businesses to insurance in ways that are innovative, hyper-relevant, compelling and personal. Over 200 insurance companies worldwide in P&C, L&A and Group Benefits are transforming their businesses by modernizing, optimizing or creating new business models with Majesco. Our market-leading solutions include CloudInsurer™ P&C Core Suite (Policy, Billing, Claims); CloudInsurer™ LifePlus...

46 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"SECURA is transforming its business to take advantage of the market growth in commercial lines. The upgrade and expansion of Majesco Policy for P&C provides us with a modern core platform as our foundation for growth. Majesco's deep experience and capabilities for commercial lines business, along with their pre-configured products with ISO content, have..."

STEVE MILLER
VICE PRESIDENT - COMMERCIAL LINES, SECURA INSURANCE

"Majesco allowed us to jumpstart Heritage to get out there and we're now over $600M in consolidated premium. So with that rapid growth, we had to sustain it. The program success comes down to basically two things: good people and a good technology platform. Flexibility was an important aspect when we selected Majesco. For me, it's a race. Our window of growth is small and if you're not able to change with the market these days and have..."

ERNIE GARATEIX
CHIEF OPERATING OFFICER, HERITAGE INSURANCE

"Shelter Insurance developed and launched a new brand, Say Insurance, to reach and serve new markets with a digital auto insurance experience and product. Our vision is to provide an insurance experience that is transparent, clear, respectful and useful to our customers, with billing being one of the most frequent and impactful experiences. Majesco Billing serves as a..."

JOHN ROONEY
VICE PRESIDENT OF INFORMATION SERVICES, SAY INSURANCE

"The launch of Majesco Policy for Group Protection opens up new channels for growth and diversification for us. I'm thrilled at what we've achieved and we are very excited about what we'll now be able to achieve in the future."

MANAGING DIRECTOR GROUP PROTECTION
LEADING UK FINANCIAL SERVICE COMPANY

TRUSTED BY

CCMSI · AmCap Insurance · Millers Mutual (There's more for you at Millers.℠) · GREENFIELD GLOBAL · US Assure



ABOUT MOMENTUM BY NOWCERTS

momentum by NowCerts

Momentum by NowCerts is an independent software company with a strong focus on the insurance industry. Their signature product, Momentum AMP (Agency Management Platform), is a cutting-edge cloud-based solution tailored to meet the needs of insurance agencies of all sizes. Momentum AMP offers robust features such as task management, self-service certificate creation, ACORD forms support, invoicing, email synchronization, loss run management, reporting tools, endorsement handling, permissions management, and reminders. With a wide range of integrations and an open API, Momentum AMP empowers agencies to centralize and...

12 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"This is our second purchased Agency Management System (AMS) within the last 10 years. By far, this has been the most intuitive and resourceful tool to help us manage our client documents and processing."

IGEE, INC.

"I like the system. I can print any form I want, I can send certs, I can sign the forms. Well I really like this agency management system."

DON ROGERS
TRI STATE INSURANCE AGENCY

"Very well done. I got NowCerts just for the certificates of insurance system they have. But its actually a great management system."

GARRY YOUNG
YOUNG AND RENOLDS GENERAL AGENCY

"I'm really liking your AMS so far! Very easy to use and lots of functionality."

JACK FRANTTI
GREEN INSURANCE AGENCY

TRUSTED BY

Gallagher Insurance

WIKE INSURANCE



ABOUT NOVIDEA

Novidea

Novidea's end-to-end platform provides real-time business intelligence and seamless workflow management for brokers, agents, MGAs, and corporate risk management. Designed specifically for insurance distribution, the Novidea cloud-based platform gives you a single view for managing the entire insurance distribution lifecycle across all lines of business. It promotes service excellence, simplifies regulatory compliance, and gives you secure data access from any device, anytime.

22 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"Novidea is all about innovative technology that empowers our business. It's a powerful and robust platform that provides us with the agility and scalability we're looking for. Responding to market changes, offering new business lines or adapting to regulatory changes have become simple tasks with Novidea, a key to our business success."

YEHUDA SHAVIT
DIRECTOR, PERSONAL LINES INSURANCE AND INFORMATION SYSTEMS, WTW

"We were impressed with Novidea's business model and the clients they work with. The stability, scalability, and flexibility of Novidea's technology, together with their insurance sector expertise, will give us an end-to-end process that will enhance the customer journey and allow us to more effectively analyse the data that we obtain."

SHARON BROWN
MANAGING DIRECTOR, HARBOUR UNDERWRITING LTD.

"Novidea empowered us to revamp how agents use data to create a great customer experience. The solution's API architecture enabled us to create a singular, secure, and centralized system of record where all our prospect and customer data is accessible in real-time when agents need it most."

PETER VITALE
CHIEF EXECUTIVE OFFICER, ENCORE INSURANCE

"Novidea's platform made a huge impact on our business. It allows us to optimise our policy management, claims tracking and financial operations workflow. It has saved us time and energy by giving us a true 360-degree view of our business in real-time, which helps us grow our bottom line."

GABI GRANT
CHIEF FINANCIAL OFFICER, MARSH

TRUSTED BY

ENCORE INSURANCE · Marsh · wtw · ENERGETIC INSURANCE · GUR INSURANCE GROUP



ABOUT SOCOTRA

socotra

Socotra is focused on delivering agility to the trillion-dollar global insurance industry. Socotra works with global insurers to modernize their technology, making it easier for them to focus on creating innovative products to grow their business. Serving one of the world's largest and most technologically neglected industries, Socotra's mission is to provide insurers with a modern, enterprise-grade core system that enables them to rapidly develop and distribute products that better serve their customers. To take its mission to the next level, Socotra is expanding rapidly. It is seeking to grow its team and are looking for candidates who are passionate about...

63 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"Socotra's flexible policy core and open APIs allowed the Elpha Secure team to seamlessly integrate our proprietary systems and reduce our deployment timeline and costs. We can now provide multiple options for personalized quotes through a streamlined digital interface. This really shows the power and promise of Socotra's platform—it has helped us bolster our user experience with a transparent and intuitive insurance process that ultimately benefits every party."

PREETAM DUTTA
CHIEF EXECUTIVE OFFICER, ELPHA SECURE

"Socotra's platform has enabled us to more quickly design and test innovative approaches while helping to solve problems that many insurance carriers face when looking to address the needs of the modern insurance consumer. With Socotra, we can accelerate our proof of concept process and we're excited to continue this partnership."

SCOTT GRANDMONT
VICE PRESIDENT, RGAX

"Socotra's expansive APIs and flexible configuration helped us deliver on our specific product needs without sacrificing engineering simplicity."

JUNAID WARWANI
HEAD OF PRODUCT ENGINEERING, JETTY INC.

"Socotra handed us the essential underlying insurance functionality as a readily developed product on a silver platter."

ALEXANDER SANDERS
CHIEF TECHNICAL OFFICER, TONI DIGITAL

TRUSTED BY

bamboo · PLAYERS HEALTH · elpha secure · Annex Risk · MS Amlin



2026

INSURANCE AGENCY MANAGEMENT SOFTWARE

RISING STAR

featured customers



ABOUT CLIENTCIRCLE

ClientCircle

ClientCircle is a leading insurance marketing automation platform in the U.S. Their software helps insurance agents manage the complete customer journey. From prospecting to sales to retention-they help their customers do it all. Based in Des Moines, Iowa, they've been helping thousands of agents grow their business for more than 10 years.

16 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"ClientCircle has created an excellent program that works very well with my agency management system and allows us to communicate on a regular basis with our clients. The feedback we have received has been invaluable and made us a better agency."

SCOTT STANBERRY
STANBERRY INSURANCE AGENCY

"ClientCircle has really helped our company grow our referral base and our online presence. The staff and team at ClientCircle is super helpful and committed to ensuring our success and providing guidance all along the way."

KIERSTEN CHRISTENSEN
INSURANCE SERVICES GROUP

"ClientCircle makes it so easy to keep in touch with your clients! The customer service is amazing. They've been quick, thoughtful, helpful, and superior in every way. Very pleased!"

BONNIE LEAIR
COVENANT INSURANCE

"ClientCircle has helped my business tremendously. The testimonials we receive that I post directly to our website are so great. Helps boost SEO for sure, thank you!"

LAURA IANNARELLI
REY INSURANCE AGENCY

TRUSTED BY

Erie Insurance BRUNDIGE INSURANCE · CHRIS ARNOTT AGENCY · MAIN STREET EST. 1898 · Harmony Insurance · STANBERRY INSURANCE



ABOUT GLOVEBOX

GLOVEBOX

GloveBox is a centralized mobile and web application allowing insurance policy holders to access their policy documents, pay a bill, initiate a claim and so much more regardless of which carrier their policies are written with. The goal of GloveBox is to enhance the customer experience for the insurance client while reducing service costs and increasing overhead for both agencies and carriers.

90 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"Our agency loves GloveBox because it gives our clients a one-stop-shop experience through web and mobile. They love that they can access documents, submit a quote request, and refer our agency! GloveBox has helped reduce our inbound service burden by allowing our clients to access their documents through our app. In turn, clients have referred our agency because of the ease of doing so, and the ease of the customer experience. Overall, our experience with GloveBox has been great, and we see it as a great addition to our agency!"

GABE
GREAT LAKES STATE AGENCY

"GloveBox has made it very easy to invite our clients to our new mobile app and client portal. The campaign has really professional agency-branded emails that describe its benefits and help the client quickly activate their account. We appreciate the added value in getting this sent out to our clients in a simple and effective way."

LEIGH ANN BAKER
PROJECT MANAGER, IMG

"GloveBox makes it very easy to increase our client adoption with the ability to invite clients manually alongside the automated client rollout campaign. We appreciate the control and access to get our clients involved in the platform quickly and easily."

BILLY DAVIS
THE BILLY DAVIS INSURANCE GROUP

"Glovebox has improved efficiency of customer communications and allowed them to ask service questions on their own time. We've been very pleased thus far with Glovebox and will continue to use in the future!"

CHRIS ENGELS
PRESIDENT, ENGELS INSURANCE INC.

TRUSTED BY

GREAT LAKES STATE AGENCY
Providing the insurance you need.

Stillman Insurance Brokers

Billy Davis Insurance Group
Merrillville Hammond Chicago Insurance

CROWLEY INSURANCE AGENCY

JAMCO INSURANCE



ABOUT HAWKSOFT

HawkSoft

HawkSoft is a leader in management systems for agencies that want effective workflows, refreshing experiences for staff and policyholders, and tools to build meaningful relationships. They take pride in being independently owned and answerable to agencies that rely on their system to power their insurance business. Created by independent agents, HawkSoft continues to evolve as a cutting-edge system that powers thousands of agencies.

39 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"Without the exceptional work of Cindy Frink in HawkSoft Client Services, who runs our analytics and crunches numbers on a monthly basis, our agency would be lost -- like endeavoring on a long road trip without a map or GPS. With HawkSoft's help we are able to monitor the pulse of our agency, know how our producers are performing, and make impactful business decisions to successfully guide the future of our agency. I love that I don't have to remember to do it! The reports are there and ready when I need them."

MIKE GREENSTEIN
WATERFORD INSURANCE CENTER

"Customers get the best of both worlds. They are getting the 24/7 access like they would with a carrier, not only to the carrier but to the agency. They can get questions asked and send you requests, allowing you to interact with them when you're not physically able to interact with them."

BRIAN BRADLEY
COVENANT INSURANCE

"HawkSoft employees understand things from an agency viewpoint. They have all been so helpful, personable, and efficient."

LEROY REDDING
EZR INSURANCE SERVICES

"When I call HawkSoft, no matter what time of day it is, it is like I'm their first call of the day."

CINDY STEINBACH
AGENCY OWNER, MAYVILLE INSURANCE AGENCY INC

TRUSTED BY

Definitive Insurance Solutions — The definitive answer to asset protection
Hawks View Insurance — Auto · Home · Business · Health · Life
Quantum Insurance Group, Inc.
Mayville Insurance
Millsaps & Associates Insurance and Bonds



ABOUT VRC INSURANCE SYSTEMS

VRC INSURANCE SYSTEMS

VRC Insurance Systems is a premier provider of business technology to the Property & Casualty insurance industry. Their technological superiority, system flexibility, service expertise, and ability to deliver a reliable end-to-end agency management system at a competitive rate make their solutions ideal for MGAs, MGUs, Wholesalers, Carriers and Retailers in both Specialty and Standard lines. At VRC, they pride themselves on analyzing current trends in technology and the insurance industry and providing solutions for their customer's ongoing and future needs. They continue to push the limits and offer their customers more flexibility with lower cost. That is why they offer...

13 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"Through the implementation of the VRC system, Orchid has been able to eliminate a number of different systems which resulted in a savings of licensing cost for the different systems as well as redundant programming costs where we had to implement changes in various systems."

MICHAEL RAY
FORMER CEO, ORCHID UNDERWRITERS

"We ultimately decided to go with VRC because we never have to tell our owners, 'No. I'm sorry. Our software can't do that."

AMY BAUMANN
COMMERCIAL LINES SUPERVISOR, THE UNDERWRITERS GROUP, INC.

"Velocity is a product that services so many different aspects of the insurance distribution system."

JEFF LEJFER
CHIEF EXECUTIVE OFFICER, NEW DAY UNDERWRITING MANAGERS

"I would definitely recommend VRC to any other company looking into systems."

SYED RAZA
VICE PRESIDENT & IT SITE MANAGER, HUB INTERNATIONAL NORTHEAST

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