featured customers

Insurance Agency Management Software Category

WINTER 2022
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.

Insurance agency management systems can store an agency's client data such as policy documents, statements, and notes. They offer reporting features for analysis of account status and sales performance. Finally, they also present functions for streamlining and automating agent workflows.

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.

2022 Customer Success Awards

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

2022 INSURANCE AGENCY MANAGEMENT SOFTWARE
MARKET LEADER

APPLIED — IPIPELINE® — Vertafore

ZYWAVE INSURING GROWTH

2022 INSURANCE AGENCY MANAGEMENT SOFTWARE
TOP PERFORMER

agencybloc — EZLynx® — INSLY

JENESIS The Agency Advantage — NowCerts.com — socotra

2022 INSURANCE AGENCY MANAGEMENT SOFTWARE
RISING STAR

Better. agency — HAWKSOFT — Partner Platform A ZYWAVE COMPANY

VRC INSURANCE SYSTEMS

*Companies listed in alphabetical order

2022

INSURANCE AGENCY MANAGEMENT SOFTWARE

MARKET LEADER

featured customers

2022 INSURANCE AGENCY MANAGEMENT SOFTWARE

MARKET LEADER

ABOUT APPLIED SYSTEMS

APPLIED

Applied Systems is a leading provider of software that powers the business of insurance. Applied is recognized as a pioneer in agency and brokerage management systems and data exchange between agencies, brokers, carriers and their clients. Automating the insurance lifecycle for more than 140,000 insurance professionals, 12,000 agencies and brokerages, and 350 carriers worldwide, Applied enables millions of people around the world to safeguard and protect what matters most.

287 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

I am writing to you this morning to inform you of my appreciation of the superior customer service that I continually receive from one of your employees. Over the last several months, I have had the good fortune to connect with Sonja H. when in need of solutions, resolutions and direction in resolving Applied TAM accounting issues with our agency system. She is thoroughly knowledgeable, professional, positive, patient, and timely with her responses and service. I feel so confident in knowing that whatever issue arises, Sonja will be able to assist in getting it resolved to our satisfaction. She is truly an asset and is very...

PEGGY CATARELLA
BOOKKEEPER, EXCEL BONDS & INSURANCE SERVICES

The reason why we love the Indio and Applied Epic integration is that it saves so much time for our agency. Once we get the application from our client, we can push it from Indio to Applied Epic to verify the information then send it directly to the insurer. We don't need to print any documents or drag and drop to our agency portal, it's all electronic.

JENNIFER HERNANDEZ
ASSISTANT ACCOUNT MANAGER, VANTREO INSURANCE BROKERAGE

I want to take a moment to thank Nick for his assistance today with a question I had for my log in. He went above and beyond the call of duty. He was courteous, patient and very helpful. We use Applied as our main source for our agency, and effective...

CHRISTY O'GARA
INTEGRITAS INSURANCE GROUP

Applied Benefits Designer is a fabulous tool because it's designed for insurance. It saves me a great deal of time.

PHAEDRA ANDERSON
RISK MANAGER, WALDO AGENCIES

TRUSTED BY

HMS INSURANCE

Nationwide

STRATTON AGENCY

TPS Insurance Agency

WELLS INSURANCE

2022
INSURANCE AGENCY MANAGEMENT SOFTWARE

MARKET LEADER

ABOUT IPIPELINE

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...

35 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

❝We have had success with iPipeline's forms, illustrations, and iGO solutions. With PolicyHS, our customers benefit by being able to complete changes and requests online, or by having our call center representatives initiate the process and then electronically route documents to them for signature. We benefit by being able to plug PolicyHS directly into our consumer facing website and call center with very little IT development on our side. This outcome is a big win-win for us and our customers, and we can...❞

GREGG POSTON
VICE PRESIDENT, INDIVIDUAL OPERATIONS, ONEAMERICA

❝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

❝We are focused on modernizing new business and in-force operations for our fraternal insurers with next-generation technologies that lower the cost of customer acquisition and better service the needs of our members. iPipeline's industry...❞

JEFF PIOTROWSKI
SVP, INFORMATION TECHNOLOGY AND INSURANCE SERVICES, CONVENTUS NOW

❝This has made my life a whole lot easier. No one has to review (applications) and look at them. Just knowing they come from iGO, I know it's going to be a quick process.❞

ASHLEY
CASE MANAGER, HUNT FINANCIAL GROUP

TRUSTED BY

Edward Jones
MAKING SENSE OF INVESTING

Erie Insurance

Lincoln Financial Group

Settlers Life
It's about people.

OneAmerica

2022 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...

---

149 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

> The system is so easy to use. The new features in FSC Rater Powered by PL Rating have really saved the agency time. We no longer have to go into a separate cost estimator when quoting homes, it is built right in. Another benefit is being able to run SAQ. It saves us time by not having to correct the quote later and knowing which company to place the business with. It is truly a blessing for our office.

TAMARA SHAVER
AGENT / COMMERCIAL LINES MANAGER, SHAVER INSURANCE

> The ability to attach case synopses, mark relevant pages, and highlight points is particularly useful for large loss notices, making it very easy for different team members to review a case. This is also priceless when it comes to outside audits. Our files look good and auditors can see what a first-class job we are doing for our coverholders.

JARROD MCKENNA
CLAIMS UNDERWRITING MANAGER, BELL & CLEMENTS

> Before we moved to 5, we had to see what was in it for us, and it made sense. The biggest benefit was in the back end; specifically, its .NET environment. When we were approached to be an early adopter of 6.0, we did the same kind of evaluation. We thought the software was very progressive.

TOM TEMPENY
MERCHANTS INSURANCE GROUP

> A VPN to the SQL server gives us full access to any scrap of data in AMS360, so we can build applications and query data that our leadership uses to help our agents succeed.

TIM LASH
DIRECTOR OF DATA ANALYTICS, BRIGHTWAY INSURANCE

TRUSTED BY

Reliable Insurance Agency — We're True To Our Name · MMG INSURANCE · LOCKTON · Marshall & Sterling INSURANCE · MERCHANTS INSURANCE GROUP

2022
INSURANCE AGENCY MANAGEMENT SOFTWARE
MARKET LEADER

ABOUT ZYWAVE

ZYWAVE
INSURING GROWTH

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.

83 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"There's no question that I have seen ROI in both winning new business and retention with my Zywave tools. Purchasing Zywave tools was an investment, especially for a small brokerage like mine, but it's been worth it and I couldn't be happier."

KURT BUURSMA
OWNER, BUURSMA AGENCY

"It's 2016. With Zywave tools and portals, insurance no longer has a stodgy connotation. People enjoy the ability to interact with their insurance program just like they do when banking or shopping online."

PETE
VP, RISK MANAGEMENT CONSULTANT, THE RICHARDS GROUP

"Our goal is innovate, motivate, educate and communicate. With the Zywave tools, we have been able to achieve that goal for our clients."

DAN BURKWALD
FOUNDER AND SOLE PRODUCER, BURKWALD & ASSOCIATES

"Zywave has helped me attract larger clients, retain my existing clients and deep sell into my current accounts."

TORI THOMAS
PRESIDENT AND SOLE PRODUCER, FORRESTER & ASSOCIATES INSURANCE AGENCY

TRUSTED BY

Integrity Insurance

GILROY KERNAN & GILROY

Coverra Insurance Services

Hardenbergh INSURANCE GROUP

The RICHARDS GROUP

2022

INSURANCE AGENCY MANAGEMENT SOFTWARE

TOP PERFORMER

featured customers

2022
INSURANCE
AGENCY
MANAGEMENT
SOFTWARE

TOP PERFORMER

ABOUT AGENCYBLOC

agencybloc

AgencyBloc helps life and health insurance agencies grow their business by organizing and automating their operations using a combination of an industry-specific CRM, commissions processing, and integrated marketing automation. AgencyBloc was created to fill a gap between web-based customer relationship management (CRM) offerings, and expensive, client-based agency management systems.

276 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

Our insurance agency was looking for a management system that gives all of the bells and whistles for a fraction of the cost. We came across AgencyBloc because of their great reviews and decided to give it a try. We have been very impressed with their system. It gets the job done and is extremely user-friendly. We would highly recommend this to anyone considering an Agency Management System.

SHELLY ALVAREZ
SHELLY ALVAREZ INSURANCE & FINANCIAL SERVICES PLLC

AgencyBloc is amazing, simple to use, user friendly, and has impeccable staff. They are always looking for new ways to improve and truly listen to their clients. They recently launched a sales pipeline feature that has truly changed the game for a one-stop-shop for all things CRM and insurance management! Must try!!

TRUDY P.
DIVERSIFIED LIFE SOLUTIONS BROKERS LTD.

Since utilizing the commission feature on AgencyBloc, I now have the necessary time to help our customers. Also, the customer service that AgencyBloc extends is beyond compare. With AgencyBloc, you can be as detail oriented as you like, and rest assured that they will be there to assist you 100%.

CATHY B.
CAMAS PRAIRIE & SEYER INSURANCE

I recommend AgencyBloc to anybody who's running an agency and trying to keep track of agents, policyholders, and carriers. With AgencyBloc, you've got it all in one single place on the web, accessible 24 hours a day with backup. It's always been on for us. We've never skipped a beat.

LYNN SCHREDER
CO-OWNER, KHI SOLUTIONS

TRUSTED BY

WEINSTEIN WEALTH INSURANCE SOLUTIONS

SWISHER INSURANCE
LIFE, HEALTH, HOME & AUTO

OSMA Insurance Agency

McKAY GROUP

HIG

2022 INSURANCE AGENCY MANAGEMENT SOFTWARE
TOP PERFORMER

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.

28   TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

As the insurance industry becomes more and more competitive and customers become more demanding of service and ease of use EZLynx allows my agency to stay at the cutting edge of technology, customer service, and efficiency. EZLynx Management System and Rating Engine allows my agency to compete with the direct writers of the world and provide the same level of service as captive agents. With EZLynx my agency can perform the same amount of service and sales work as an agency twice our size. With EZLynx I can focus on growth.

ZACHARY I. NAVO
NAVO FINANCIAL INC.

EZLynx is the perfect name for such a user-friendly, efficient, modern day system. The system is so easy to navigate and understand. I have worked with 3 management systems in the past, and EZLynx is the most efficient system I have ever used. With today's technology these guys have it all—even if you are not so tech savvy this system is for you as well. I couldn't be happier with the tools and features EZLynx has implemented in making policy management so efficient. Kudos to your team!

GRACIE GUERRERO
ULRICH SAYLER & ASSOCIATES INSURANCE

EZLynx Management System is absolutely the best system I have experienced. The system is easy to use. The tutorials are well put together. The information is accurate. I am very happy with it. Thank you for introducing me to the EZLynx system.

CHARLES 'CHUCK' HOLSINGER
CACTUS INSURANCE AGENCY

Hands down - it's the best management system out there. If any agency actually gives it a chance, and works through it, they will be blown away at what the capabilities are - at a reasonable cost.

BRIAN BURNS
FOUNDER & CEO, COMPASS INSURANCE

TRUSTED BY

Access INSURANCE AGENCY, INC.   **Alabama** Insurance Agency   **CACTUS** INSURANCE AGENCY   **i.e.** Insurance   **Twin Bridges** INSURANCE AGENCY, INC.

TOP PERFORMER

2022
INSURANCE
AGENCY
MANAGEMENT
SOFTWARE

ABOUT INSLY

INSLY

INSLY = Insurance Easily Insly is a Full-Stack SaaS platform founded on the principle of making insurance easy for businesses. Our mission is to digitize the operations of insurance businesses and connect insurance distribution (brokers and agents) with supply (Insurers and MGAs). Built on Success Spun out of IIZI Group, an early digital broker and pioneer of online insurance sales in CEE...

46   TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

> Insly's taken that all away now because the platform can manage to generate the quote for us without us having to look at it. We get very few referrals from brokers because the system eliminates all those 'iffy' enquiries - whether it's going to be acceptable/not acceptable. The brokers know that if the system provides a quote, then that's the quote that will go ahead. So they don't have to ring or email us for a referral. They know straight away that the price is the price. They can go on cover and reduce their admin time as well.

PAUL GALLOWAY
FOUNDER & MANAGING DIRECTOR, UK INSURANCE SOLUTIONS

> Insly, with its clever and improved IT systems, has given us very important and efficient support to handle the insurance policies of our loan collaterals and leasing assets. I would recommend Insly's high quality services to any leasing company and financial enterprises who wants to outsource the insurance administration activities with integrated IT systems and reach the 99% insurance coverage of all collaterals. They really can do it. Thereby, the Insly solutions protects the interest of both the lender and the borrower.

TARVO-JAAN REBANE
HEAD OF RETAIL SERVICES, DANSKE BANK A/S ESTONIA BRANCH

> Cactus chose to work with Insly as we had some key areas that were important for us (e.g. possibility to do web sales, readiness to allow for broker access, different automation and potential to tap into insurer rating engines and data sources) and it seemed after our initial discussions that Insly ticked many of the boxes.

NICHOLAS ROLFE
MANAGING DIRECTOR, CACTUS

> We know that the Insly solution is perfect for policy administration and reporting, but the work Insly's team did to meet our additional needs for sales process simplification at the store level exceeded all our expectations.

ANDO KIVILAID
CHIEF EXECUTIVE OFFICER, WARRANTY INSURANCE

TRUSTED BY

Nordea   **MGA Encompass**   **1st first insurance**   **AON**   **WARRANTY INSURANCE**

2022 INSURANCE AGENCY MANAGEMENT SOFTWARE

TOP PERFORMER

ABOUT JENESIS SOFTWARE

JENESIS
The Agency Advantage

Jenesis Software creates enterprise quality Agency Management System Software for the Insurance Industry. Jenesis Agency Management Solutions features built-in marketing campaigns for prospecting and retention, quote management, real-time company policy inquiry, automated customer calling, 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 Software also offers fully optimized agency websites featuring prime Google ranking results...

33 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

❝It's phenomenal to be able to let the phone system use the data in Jenesis agency management system to keep your clients informed about their policies. The integration between Jenesis and PhoneTree allows us to process cancellations during the day in Jenesis, and that evening, and the PhoneTree system will call and remind our customers with a personal message from our agency that their policies are cancelled or pending cancellation. This kind of service just makes our clients feel like they are important and that our agency really pays attention.❞

LEE ANN PRIDGEON
PEGRAM & ASSOCIATES

❝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...❞

JIMMY BARNETTE
OWNER, BARNETTE AND COATES INC

❝The nice thing about Jenesis is that it allows us to take care of our daily tasks and it's affordable. You control the features you want. By having everything at our fingertips we are able to provide service to our customers more efficiently, so they spend less time in the office and more time doing the things they enjoy.❞

JOHNSON INSURANCE MANAGEMENT

TRUSTED BY

PEGRAM INSURANCE — WE SHOP FOR THE BEST RATES TO SAVE YOU MONEY

THAT INSURANCE GUY.net

TEAMWORKS INSURANCE AGENCY

Poston INSURANCE AGENCY

IMPERIAL Insurance & Financial Solutions

2022
INSURANCE AGENCY MANAGEMENT SOFTWARE
TOP PERFORMER

ABOUT NOWCERTS

NowCerts.com

NowCerts.com is a software development company concentrating in the design and implementation of insurance-related solutions. Fully functional, affordable, user-friendly Insurance Agency Management System designed with the independent agent in mind.

12 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

"We have tried at least 3 agency management systems in the past, but the layout don't look as nice & clean and intuitive as NowCerts. My staff is very happy with their "super fast" service. My partner loves Peter because he is always open to new ideas to make their system better. Besides that, Peter always respond to our requests after business hour."

JACKIE HOANG
PRESIDENT, ACE TRANSPORTATION INSURANCE

"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.

"NowCerts was originally selected to helped us manage our clients that have large number of certificates of insurance. We have found that this was the easiest system to use."

BENEFIT INTELLIGENCE

"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

TRUSTED BY

WIKE INSURANCE

TRUX INSURANCE SERVICES

HUDSON Insurance Agency

Green INSURANCE AGENCY

ALL LINES INSURANCE

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...

49 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

❝ Our approach is to leverage state of the art data and technology in order to meet the evolving needs of our customers and transform the insurance industry. That requires technology that embraces modern architecture, is cloud-native, and scalable. Socotra meets all those requirements and also provides us with the technology platform that fosters innovation with an eye on customer-first service. Many insurtechs fail to realize that efficient integration is the key to faster migration and adoption, but Socotra provides a seamless integration process with... ❞

JOHN CHU
CHIEF EXECUTIVE OFFICER, BAMBOO INSURANCE

❝ Socotra offers the best platform to support our future scale and long-term vision to become a global reinsurance carrier. Ledgebrook was founded by insurance industry insiders who have lived the pain points in the current technological landscape and wanted something better. Socotra delivers the most flexible and modern technology, enabling us to get to market quickly and launch a wide array of insurance products to fit the needs of our business and customers. ❞

GAGE CALIGARI
FOUNDER AND CEO, LEDGEBROOK

❝ 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... ❞

SCOTT GRANDMONT
VICE PRESIDENT, RGAX

❝ KOBA is empowering mid-sized carriers to activate and scale innovative insurance products—from day one. By partnering with Socotra, we are laying down a rock-solid technological foundation to rapidly launch multiple usage-based insurance products, flexibly white-label them for mid-sized carriers, and... ❞

ANDREW WONG
FOUNDER AND CEO, KOBA INSURANCE

TRUSTED BY

SIGO SEGUROS   **elpha secure**   **covertree**   **Hippo**   **bamboo**

2022

INSURANCE AGENCY MANAGEMENT SOFTWARE

RISING STAR

featured customers

2022 INSURANCE AGENCY MANAGEMENT SOFTWARE

RISING STAR

ABOUT BETTER AGENCY

Better.
agency

Better Agency is an all-in-one platform that gives Insurance Agents a high-tech, yet easy-to-use solution for marketing, prospecting, sales and retention – without the stress of learning how to build and use different systems. Better Agency was designed to relieve you of the headache that comes from growing your business and keeping your clients happy. No more having to become a tech master to get results for your agency. No matter what size your agency is, Better Agency will help you win more customers — period.

28 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

I can point to accounts each month that were closed because of Better Agency. Our ROI over the last few months has been between 600% - 800% and continues to increase. I can't say all of our investments have generated those kind of returns. Thank you Better Agency!

STEWART FARRIS
FARRIS INSURANCE ADVISORS

I wanted a system that could handle everything in my agency including rating. Better Agency's rater is simple to use and gives me accurate rates. The follow up from Better Agency has helped me close more deals every month.

SYLVIA JOHNSON
AGENCY OWNER, JOHNSON INSURANCE

Being able to weaponize my downloads has saved me a ton of time and allowed me to focus on other parts of the agency. Using the Insurance AMS allows me to really scale the business.

JEROMY HUERTA
HERITAGE INSURANCE

We're getting so many leads that sometimes it's hard to keep up with what we're working on. With Better Agency we're able to use their automated campaigns to keep up with a customer so that we don't have too.

RENADO ROBINSON
CROSSWINDS INSURANCE

TRUSTED BY

KMH Insurance Group · REED INSURANCE · SafeStreet INSURANCE · Heritage · JOHNSON INSURANCE

2022
INSURANCE
AGENCY
MANAGEMENT
SOFTWARE

RISING STAR

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.

32 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

I'm a 'one man band' and HawkSoft allows me to get all my work done in a regular work day leaving me time for family. The attachment process is so simple I was able to go paperless immediately upon switching from another vendor whose process was too cumbersome to be efficient.

LARRY DOUGLAS
DOUGLAS INSURANCE

HawkSoft Text Messaging benefits everyone in our agency. Clients love the ease of communication, our staff finds it is often the quickest way to reach clients, and management appreciates the compliance and E&O features. That's a win-win-win!

JESSE VILLAFRANCA
EVERGREEN INSURANCE INC

HawkSoft has positioned our agency to be more efficient and organized. Re-quoting business and documenting files has never been so easy. Every independent agency should consider HawkSoft.

ANTHONY ROLLINS
ROLLINS INSURANCE

TRUSTED BY

EZR
INSURANCE
SERVICES

KAPLAN
INSURANCE

ROLLINS
INSURANCE

Waterford
Insurance Center

**Select
Insurance
Services**
AGENCY INC.

featured customers

ABOUT PARTNER PLATFORM

Partner Platform
A ZYWAVE COMPANY

Acquired by Zywave in 2022, SIS is a group of highly trained customer service personnel, knowledgeable insurance professionals and expert technical specialists dedicated to helping independent insurance agents grow their business with innovative and robust technology. We have first-hand knowledge of carrier operations and back end systems as well as an ongoing presence within agent offices. We are committed to providing a state of the art agency management system, Partner Platform, that meets the specific needs of the independent agency and insures excellent integration with…

76
TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

I've never worked with another management system provider who was more accessible and responsive than Partner Platform. When an issue arises, we get the attention needed to resolve it. When we have a suggestion for an improved workflow or process, they do what they can to deliver, making those improvements in almost every case.

LARA L. MOFFITT
CHIEF EXECUTIVE OFFICER, MHJ INSURANCE AGENCY

There is real bang for your buck with Partner XE but it's more than just saving money. It's the whole package. It's a seamless transition to a new system with high functionality and ease of use. It's personalized relationships and constant, accessible customer service that will remain beyond the on-boarding process. You'll never be just a number with SIS.

MARK PERKINS
PERKINS INSURANCE AGENCY

With Partner XE, you'll benefit from constant improvements and updates to the system, some of which are scheduled upgrades, as well as other enhancements. You'll also see custom features, as SIS listens to feedback from agencies and actually implements changes to serve specific agency needs.

ANDREW THAYER
PRESIDENT, BATCHELDER BROS. INSURANCE

Partner XE can not only offer all the functions that your agency needs, but also costs about 1/3 less than any of the solutions provided by the bigger providers. You get so much more for your money with Partner XE. Make the switch and you won't regret it. In fact, your agency will be better for it.

JOHN YASIK
POLAND & SULLIVAN INSURANCE

TRUSTED BY

PHIL RICHARD INSURANCE

Sweet Insurance Agency
INSURANCE SINCE 1919

PINNACLE GROUP

THW Insurance Services, LLC

LYNDALL INSURANCE

featured customers

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

" *It's great to have a system where you can configure it so easily. If you've got a new product that comes online, it's relatively easy to build out the products in quite an efficient and quick way.* **"**

MARK SHRIMPTON
BUSINESS SYSTEMS ANALYST, BRIT GLOBAL SPECIALTY

" *I would definitely recommend Velocity for any insurance agency or carrier looking to change agency management systems. The system is highly functional, but it's also highly customizable.* **"**

CALVIN SULLIVAN
PRESIDENT & COO, CM&F GROUP

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

JEFF LEJFER
CHIEF EXECUTIVE OFFICER, NEW DAY UNDERWRITING MANAGERS

TRUSTED BY

CLEAR risk solutions

THE UNDERWRITERS GROUP COMMERCIAL INSURANCE

BRIT

new day UNDERWRITING MANAGERS LLC.

CM&F GROUP.INC