



# ASI Quarterly

*September 2023 Edition*

Hello insurance professionals and partners! We at Agency Software are proud to serve you and our complex industry. Today most agencies are facing significant marketplace challenges made worse by inflation, a tough labor market, and severe weather. All of this on the tail of vast culture changes in the post-pandemic workplace. While we may not have the answer for every struggle, we believe we offer valuable solutions that can increase your efficiency on a road to best practices.

Our goal is to provide you the best service we can, and increasing communication is what this quarterly newsletter is striving to accomplish. Look here for other communication and training opportunities as we begin to focus on ways to help you make the most of your Agency Software tools. We appreciate your comments or suggestions and look forward to a bright future together.



## **September 14-16 - Palm Desert Agents Alliance Conference**

We are back on the road and aiming for the beautiful Palm Desert! Agency Software is scheduled to attend the American Agents Alliance 2023 Conference & Expo on September 14th-16th. Stop by our booth to meet Tom Watson and Lori Mitchell and to discuss how we can help you achieve your goals!

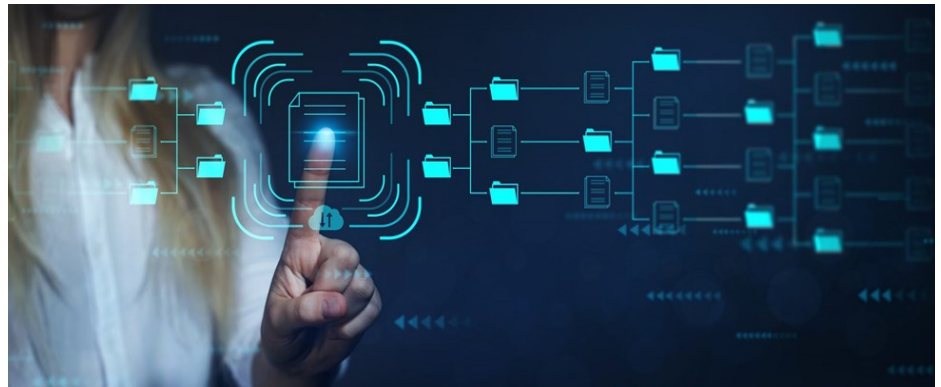
## **September 27-29 - Spokane IIABQ/PIC Conference**

We have confirmed our participation in the IIABW/PIA Annual Conference which will be held on September 27th-29th at the Davenport Grand in Spokane, as well as the annual golf tournament. We are excited to meet some of our local agencies, so please stop by our booth to meet some of our friendly staff, enter our raffle, and discover how we are serving the marketplace!

## **INDUSTRY:**

### **One True Source**

In the dynamic landscape of the insurance industry, accurate and up-to-date information is the cornerstone of success. As insurance agencies handle vast amounts of data related to policies, claims, customer information, and risk assessments; ensuring data integrity becomes a critical role to your technology strategy. The concept of a "Single Source of



Truth" (SSOT) refers to a centralized and authoritative data repository that holds all relevant information and ensures that it remains consistent and reliable across an

organization. Agency Software endeavors to provide our partner agencies with the tools to build and maintain their main data source.

There are many arguments to reinforce the investment in maintaining an SSOT that include important elements such as creating a unified view of the agency's operations, enhancing decision-making processes, and elevating customer experiences. By integrating multiple functionalities into a single platform, you can simplify daily tasks. This leads to improved workflow efficiency, reduced duplication of efforts, and more time for client engagement. Integrations to your management system (such as download or rating) can provide data consistency and huge time-savings, and the risk of data discrepancies is significantly reduced.

The Insurance Journal, in a whitepaper on data management in the insurance industry, highlights how an SSOT can lead to better pricing models, optimized risk assessments, and improved customer retention rates. Agencies with a comprehensive SSOT can unlock valuable insights from their data, enabling them to introduce innovative products and services to meet changing customer needs.

Using tools such as the permanent notes, ticklers, automatic transactional file, and imaging features can reduce the agency's E&O exposure risks and greatly enhance office communication, even in this complex post-pandemic workspace where agency staff commonly works from remote locations. Powerful and flexible reporting abilities allow you to generate reports and lists that may even integrate with third party marketing tools. AgencyPro's full accounting features are a natural way to ensure data accuracy, minimize accountant costs, and create the confidence you need in your SSOT.

With over thirty years serving this industry, we know how challenging implementing these practices can be. We believe that every agency has unique needs and are at different points on the path to best practices. No matter where you are on your journey, we encourage you to carve out a little time regularly to analyze your practices and determine a value-added step to enhance your workflow. In that effort we hope you will turn to us as a valued partner on that path, and that you will watch for our next articles geared toward your building confidence in your single source of truth!



### EMPLOYEE SPOTLIGHT: *Mark Aldridge*

It seemed appropriate for our first featured employee to be our esteemed account manager, Mark Aldridge. Mark celebrates his 26<sup>th</sup> anniversary with Agency Software this month and

shaping partner in the growth of our products and services.

Originally from Boone, North Carolina, Mark has lived in North Idaho for over thirty years and enjoys breakfast with his mom and visits with his two sons and seven grandchildren who all live locally. Mark loves to spend his time working in the yard, playing on the water, or out on the golf course. He is up before the sun each morning for his daily workout at the gym, and last year accomplished 10,600 pushups in a one-month challenge!

Mark's success is driven by his love of people. He enjoys getting to know his clients throughout the country as well as his time

carries great knowledge of the technology and how we serve the industry marketplace. With his long company history, he has been a

spent with the ASI staff. When asked what he likes most about working at Agency Software he says that it has always felt like working with family. He also loves providing great products and service to his valued clients.

With over two decades of experience Mark has seen much change in the industry. In his first years here at Agency Software he spent his days selling EasyApps. Today, he sees agencies challenged by a tough insurance

market. He loves having a much broader product line today and enjoys spending time with his clients finding the best solution to fit their needs.

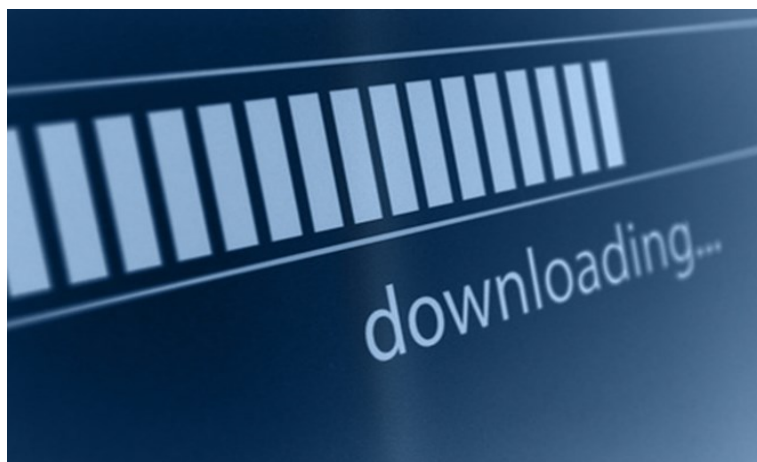
When we ask Mark where he hopes to be in five years he replies, "on a sunny beach". While we do hope he finds that beach one day, today we are proud to have him on our team and believe he is one of the reasons Agency Software is a truly great company.

## TECHNOLOGY: *Download: Can it save you time?*

Have you wondered if company download is a feature that can save your agency time? Our EZ Download Manager is a tool used to convert company-sent files into management system data. When a file is received from the carrier, typically sent through an assigned Ivans mailbox, it is processed through suspense and attached to the management system. The type of data created in the management system depends on the carrier sending the file, the line of business, and your subscribed product's features but may include the:

- Client record
- Policy (with limits under many circumstances)
- Personal record (drivers and listed household members)
- Vehicles (with individual vehicle limits)
- Personal properties
- Commercial drivers
- Commercial properties
- Equipment
- Claims and claim changes
- eDocs – to file under images
- Direct bill commission statements (must have AgencyPro with Download Plus)

Just imagine how much time you can save not having to enter this information by hand!



So the next step to discovering how helpful this tool may be to your agency is to inspect our Carrier Partner list (found at our website at [www.agencysoftware.com](http://www.agencysoftware.com)). While agencies with direct appointments are likely to find many of their companies listed, those working mainly through brokers may not yet be eligible candidates. However, some brokers may offer sub-codes for the purpose of downloading, and there is movement in the industry to make the broker connections, so if this is you, contact your major broker to see if they have an avenue for direct download.

Are you not finding an important carrier on the partners list? Contact your carrier connection to query on their intention for download, and if they are already sending downloads please have them reach out to our integrations team [integrations@agencysoftware.com](mailto:integrations@agencysoftware.com), and check the News section of this newsletter to see our newly added download companies and coverages.



Are you interested in adding EZ Download Manager? Reach out to your account manager to discuss how to get started with this essential time-saving feature!

Not sure who your account manager is? Email [sales@agencysoftware.com](mailto:sales@agencysoftware.com) for an introduction.

## ASI NEWS



### **New download certifications**

*We have recently added or enhanced these carrier partner download certifications:*

- *Aon - Mobile Home*
- *CFM Insurance - Farmowners*
- *Chubb - Direct Bill Commission Statement*
- *CoverTree - Mobile Home*
- *DTRIC - Dwelling fire, Homeowners, Personal Umbrella*
- *Eastern Alliance - Workers Compensation*
- *Farmers Mutual of Marble - eDocs*
- *Farmers Mutual of Nebraska - Claims*
- *Frankenmuth – Auto, Boat, Dwelling Fire, Homeowners, Personal Package, Personal Umbrella*
- *Grange Insurance Companies - eDocs*
- *Insight Catastrophe Group LLC / Sagesure Ins Managers - Businessowners*
- *Main Street America - Commercial Auto, Commercial Umbrella*
- *Meadowbrook-Ameritrust - Commercial Auto, Commercial Umbrella, Direct Bill Commission Statement*
- *Mid Continent Group - eDocs*
- *Millennial Specialty Insurance Group - Flood*
- *Motor Transport Mutual RRG - Commercial Auto*
- *Nazareth - Direct Bill Commission Statement*
- *Palomar Holdings, Inc. - Homeowners, Flood*
- *Philadelphia Insurance - Commercial Package, Commercial General Liability, eDocs*
- *Plymouth Rock - Claims*
- *Preferred Risk - Auto*
- *Rockingham Insurance Co - Personal Umbrella*
- *Travelers Commercial - eDocs*
- *Vermont Mutual Insurance Group - Auto*
- *Western National Insurance - Direct Bill Commission Statement*

For a full listing see [www.agencysoftware.com/download/Certified\\_Companies.pdf](http://www.agencysoftware.com/download/Certified_Companies.pdf)

## **Billing department changes**

*ASI is undergoing a transition to more sustainable billing practices throughout August and September 2023. In the following months you will see these changes that include:*

- *Transitioning to electronic delivery*
- *Assignment of static account numbers*
- *Better access to online payment methods*
- *A dedicated billing contact.*

*This change may require alterations in recurring payment methods. If these changes affect you, or your email address needs updated, our billing department or your agency account manager will reach out to you directly. If you have any trouble receiving or paying your invoice, please reach out to:*

*By Phone: 1-888-847-7747*

*By Email: [AR\\_Agency\\_Insurance@harriscomputer.com](mailto:AR_Agency_Insurance@harriscomputer.com)*

*By Mail: 33115 Collection Center Drive, Chicago, IL 60693-0331*

*Our Credit Card Payment Portal can be found at [www.agencysoftware.com/payments](http://www.agencysoftware.com/payments)*

## **Quarterly Newsletter Returns!**

*We hope to collect relevant articles and information to best serve our partner agencies. If you would like to sign up for our newsletter please click [Subscribe to Newsletter](#) in the footer at [www.agencysoftware.com](http://www.agencysoftware.com) or email "Subscribe Quarterly" to [communications@agencysoftware.com](mailto:communications@agencysoftware.com).*

## **Launching Innovation Group**

*With an aim at ways to best serve the agency and industry, we are launching an innovation group. This group will consist of a panel of partner agents and ASI team members who will help us to properly prioritize our upcoming initiatives. Panel member expectations are to serve a two-year term and to participate in a quarterly remote forum. If you are interested in serving on the Innovation Group panel, please contact your account manager.*

## **Rating Beta**

*Agency Software enters the beta phase of our rating platform. Working through our sister company, QuoteBurst, we aim to provide an affordable tool to convert your management system data into a smooth and efficient personal line quoting experience. We expect our beta phase to run through the third quarter of 2023 and be available in the 4<sup>th</sup> quarter. If you have interest in participating in the beta process, or would like to be contacted upon release, please reach out to your account manager or email [sales@agencysoftware.com](mailto:sales@agencysoftware.com).*

## **OUR COMMITMENT**

*We are committed to service excellence and strive for continual improvement in the way we serve you. Do you have comments or suggestions? Please email us at [communications@agencysoftware.com](mailto:communications@agencysoftware.com), or contact your account representative.*