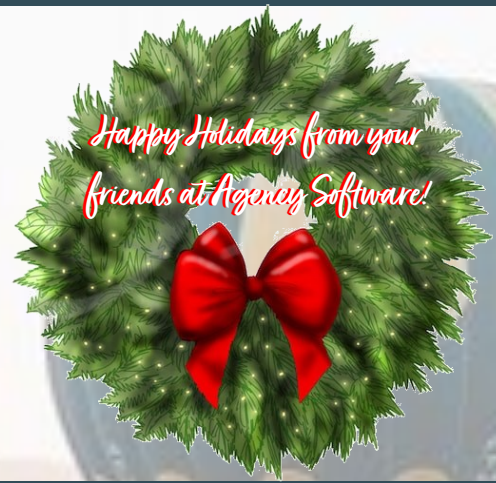


# NEWSLETTER

DECEMBER  
2025



*In this edition:*

Building the  
Future of  
Independent  
Insurance

Looking  
Ahead: 2026  
Roadmap

Featured Employee:  
Cindy Moyer



## **Building the Future of Independent Insurance: Supporting New Agents & Preparing for Transition**

As 2025 comes to a close, the independent property and casualty insurance industry stands at a pivotal crossroads. A wave of seasoned agents—whose average age is around 46 years—is approaching retirement, while a new generation is stepping in—bringing fresh energy,

digital fluency, and high expectations for technology and support. [zippia.com]

Attracting next-generation talent isn't just about recruitment. It's about helping them thrive in a fast-evolving marketplace. Today's emerging agents are digital natives, expecting intuitive tools, real-time data, and automation from day one. What they often lack is deep industry knowledge, proven workflows, and access to mentorship. That's where Agency Software comes in.

Our platform is built to support new agents from the ground up. We provide structure for tracking policies through every phase and offer caring, hands-on support to guide best practices. CRM features help manage leads, automate follow-ups, and build strong client relationships. Smart ACORD form tools reduce errors and save time by auto-filling client data—making complex tasks easier

*Continued...*

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**26% of Gen Z**  
employees say they're **most productive**  
working during late hours (6pm-3am)



compared to just  
**6% of Boomers**

for those still learning the ropes. And with our extensive training resources, agents can build confidence while staying productive.

Collaboration is seamless too—new agents can tag senior staff, share notes, and escalate tasks, making mentorship a natural part of their daily workflow.

At the same time, many agency owners are thinking about retirement and wondering how to maximize the value of the businesses they've built. The good news? Investing in the next generation is one of the best ways to do just that.

Modernizing your operations is key. A tech-enabled, well-documented agency is far more attractive to buyers and successors. That means investing in systems that streamline workflows, automate communications, and provide clear performance metrics. Clean, organized client data also makes your book of business easier to evaluate and transfer. Adding integrated accounting maximizes your management system's value by ensuring data accuracy.

Building a strong bench of talent is equally important. Mentoring young agents and giving them the tools to succeed ensures continuity and demonstrates that your agency has a future. And if you're serious about succession, consider working with a planning advisor who

understands the independent agency space. They can help structure a transition that meets your financial goals while preserving the legacy you've built.

Whether you're preparing to pass the torch or helping new agents find their footing, Agency Software is here to support you. Let's build the future of independent insurance—together.

### **IN-PERSON EVENTS**

#### **June 17th-19th - FAIA in Orlando Florida**

*ASI will be back in Orlando to see our friends at FAIA! Stop in to say Hi and see how we can help you in your journey to success!*

#### **September 15th-17th - ASI Open House in Hayden Idaho**

*We are excited to welcome agents to our hometown for an in-person training and networking event. We will introduce our teams and focus on best practices for building an enduring organization. This will be an excellent opportunity to take our partnership to the next level!*

#### **September 29th-30th—IACON in Columbus Ohio**

*We are excited to be first-time exhibitors for OIA's IACON! We look forward to connecting with our Ohio agents and learning how we can serve this great region!*

# Looking Ahead

## Agency Software's 2026 Roadmap

As we head into 2026, Agency Software is excited to share a bold and forward-thinking roadmap designed to empower independent agencies with smarter tools, deeper insights, and more flexibility than ever before. At the heart of this evolution is our Version 2 release, which lays the foundation for a new era of automation, connectivity, and user experience.

We're expanding download automation, making it easier for agencies to stay in sync with carrier data and reduce manual entry. This enhancement is all about saving time and improving accuracy—two things every agency values.

Next up is Agency2Go Lite, a web-based version of our popular EasyApps product. It's lightweight, accessible from anywhere, and perfect for agencies that want a streamlined solution without sacrificing functionality.

We're also introducing Agency Intelligence, a new initiative focused on turning data into actionable insights. From performance metrics to client behavior trends, this feature will help agencies make smarter decisions, faster.

The full release of Agency2Go v2 brings a fresh look and feel, along with endless innovation potential. It's more intuitive, more powerful, and built to grow with your agency.

And yes—we're launching a mobile app! Agents will be able to quote, manage clients, and stay productive on the go, with a user experience designed specifically for mobile workflows.

One of the most exciting additions is ASI Connect+, a modular API subscription that allows agencies to integrate with a curated collection of third-party tools. Whether it's carrier data, comparative raters, CRM



platforms, or analytics dashboards, ASI Connect+ makes it easy to build a tech stack that works for your agency.

We're also rolling out a client portal, giving policyholders secure access to their documents, billing info, and service requests—reducing call volume and improving client satisfaction.

Finally, Agency2Go Plus will introduce full accounting capabilities, bringing financial management into the same ecosystem as your operations. It's a major step toward a truly unified agency management experience.

2026 is shaping up to be a transformative year, and we're thrilled to be on this journey with you. Whether you're a long-time partner or just getting started, Agency Software is committed to helping you grow, adapt, and thrive in the evolving insurance landscape.

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*We're looking for passionate agency leaders to help shape the future of our technology. As a CAB member, you'll have early access to product roadmaps, influence upcoming features, and collaborate with peers driving change in the industry.*

*Interested? [Reach out today](#) to get an invitation to apply for next year's CAB.*



## Close Out 2025 with Confidence—Start 2026 with Momentum

As the year winds down, it's the perfect time for independent agents to reflect, reset, and prepare for a strong start to the new year. Whether you're a solo producer or part of a growing agency, this checklist will help you wrap up 2025 efficiently and set the stage for success in 2026.

- Reconcile your bank accounts (Apro users)
- Review your book of business reports and performance metrics
- Set goals and production targets for 2026
- Strategize your 2026 communication strategies
- Review your security practices and internal processes
- Schedule your close books with the support team (Apro users).

Let's make 2026 the best year yet!

## Featured Employee: Cindy Moyer

When you call Agency Software for accounting support, chances are you'll be greeted by Cindy Moyer's warm, reassuring voice. For the past 12 years, Cindy has been a cornerstone of our support team—bringing expertise, patience, and care to every interaction.

Cindy's journey began far from North Idaho. Born at China Lake California, she grew up as an Air Force kid, learning discipline and adaptability on military bases. Those early lessons still shine through today—she's always the first to arrive, building in a buffer for the unexpected. At age 11, Cindy moved to North Idaho, where her family plugged into the community and even helped to develop the local city park. Today, she calls downtown Coeur d'Alene home, enjoying the vibrant community while preferring the comfort of indoor life.

Her first job? Washing dishes at the Husky truck stop in Post Falls—a role that taught her the value of hard work (and came with a free meal!). Cindy's career in insurance technology began in the 1990s at AgencyOne as a shipping clerk. Within a week, her potential was clear, and she transitioned into training bookings under the mentorship of Candi Craigo. From there, Cindy built a deep foundation in insurance accounting, working with AMS, then at a local agency,

before joining Agency Software at Marla's invitation. The rest is history.

What makes Cindy exceptional isn't just her technical skill—it's her genuine care for customers. She loves talking to agency teams across the country and often quips that she "gets to be on the phone all day." Her advice to clients? "Get in there and try it. If something goes wrong, call us—we'll help to fix it."

Outside of work, Cindy enjoys gardening and has mastered the art of leaving work at work. She's also a proud mom of four grown children and two step-grandchildren. When asked where she'd travel if given the chance, Cindy dreams of Ireland and Scotland, connecting with her heritage. Her favorite quote, from Gandalf in *The Lord of the Rings*, sums up her outlook: "All we have to decide is what to do with the time that is given us."

Cindy has witnessed tremendous changes in the industry—from shifting commission structures to hard markets—and believes collaboration between customers and developers is key to navigating the future. Through it all, one thing remains constant: Cindy's unwavering commitment to making every customer feel supported and cared for.

At Agency Software, we're proud to have Cindy on our team. Her knowledge, kindness, and dedication set the standard for what exceptional support looks like.

*Aerial view of City Park in Coeur d'Alene; thanks to families such as Cindy's!*



## 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.*