

NEWSLETTER

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On the Road & On the Rise *How Flexible Agencies Win This Summer*

Summer in an independent agency can feel like a tug-of-war: kids are out of school, clients are traveling, producers are on the road, and your team is trying to balance real life with real growth goals. But the agencies winning in 2026 aren't asking their teams to "power through" the season—they're designing operations that make it possible to serve clients well, hit their numbers, and still enjoy time off. In short, they're on the road and on the rise, growing their business while

giving their teams more flexibility, not less. Here are a few ways leading agencies are making that balance work.

High-performing agencies start by defining a clear "summer service promise." Rather than leaving expectations to chance, they align both staff and clients on what good service looks like during the busy summer months—response times, escalation paths, and coverage plans are all spelled out. This clarity allows team members to truly unplug when they're off, knowing nothing will fall through the cracks. With Agency Software, these standards can be reinforced through structured workflows, shared procedures, and task management tools like work items and activity tracking. Agency2Go builds on this by simplifying workflows, making it faster for teams to log, assign, and complete work from anywhere.

These agencies treat their agency

Continued...

management system as the central hub for all work, especially in a season when people are frequently out of the office. Winning agencies ensure that every client interaction, policy detail, and note is captured in one place, creating a true single source of truth. This allows any team member to step in seamlessly when someone is traveling or on vacation, with full visibility into conversations, open requests, and next steps. Agency Software supports this with centralized records and shared workflows, and with Agency2Go Lite and the upcoming Agency2Go V2, the experience becomes even more intuitive—fewer clicks, cleaner navigation, and better usability whether at a desk or on the road.

Another key difference is automation. Instead of relying on manual processes that tie people to their inboxes, successful agencies automate routine tasks so their teams can focus on meaningful work—and enjoy important summer moments.

- Automated reminders for renewals, follow-ups, and documentation
- Template-based communications and repeatable workflows

These efficiencies free up time and mental space without sacrificing service quality. Agency Software already provides strong automation through work item features and templates, while your system streamlines daily activity management so teams spend less time navigating systems and more time helping clients.

Finally, top agencies embrace flexibility for producers and normalize real time off as part of their culture. They equip producers with easy ways to log activities, access account information, and track opportunities while traveling,

eliminating the need to choose between being present in the field and staying organized. At the same time, they cross-train staff, document workflows, and avoid single points of failure so vacations are truly possible. With Agency Software, shared visibility and task reassignment make it easy to maintain continuity, ensuring clients are cared for and teams feel supported.

Balancing life and growth is no longer a perk—it's a competitive advantage. When your team can confidently serve clients, achieve their goals, and still enjoy the season, they bring more energy and focus to their work. At Agency Software, we are investing in the tools designed to make that balance a reality—helping your agency stay both on the road and on the rise this summer and beyond.

““A one percentage-point increase in remote workers is associated with a measurable increase in productivity growth.”

~U.S. Bureau of Labor Statistics (2025)

7 WAYS WE'RE SIMPLIFYING YOUR DAY-TO-DAY



1. SIMPLIFIED NAVIGATION

Get where you need faster with a cleaner, more intuitive experience.



2. SMARTER WORKFLOWS

Tools designed to match how agencies actually work—tasks, follow-ups, and documentation.



3. CLEARER VISIBILITY

Better insight into clients, workload, and performance for stronger decisions.



4. BUILT-IN AUTOMATION & AI SUPPORT

Reduce manual work with smarter automation and emerging AI-driven efficiencies.



5. STRONGER TEAM COLLABORATION

Shared information makes it easy for anyone to step in and keep work moving.



6. FASTER NEW HIRE RAMP-UP

Simple, guided workflows help new team members become productive quickly.



7. FUTURE-READY GROWTH

A connected path from Lite to V2 to Plus—built to grow with your agency.

Stronger Together

Who Harris Computer & Insurance Agency Solutions Are to Us

You may have recently heard more about Harris Computer and Insurance Agency Solutions (IAS) and wondered how they connect to the Agency Software you know and trust. We want to take a moment to clarify that relationship—and more importantly, to reassure you that what you rely on isn't changing.

Harris Computer is our parent company—a global organization that invests in software businesses like ours for the long term. Within Harris, Insurance Agency Solutions (IAS) is the business unit focused specifically on serving the insurance industry. And within IAS, Agency Software is the product and team you work with every day.

In other words: different names, one aligned purpose.

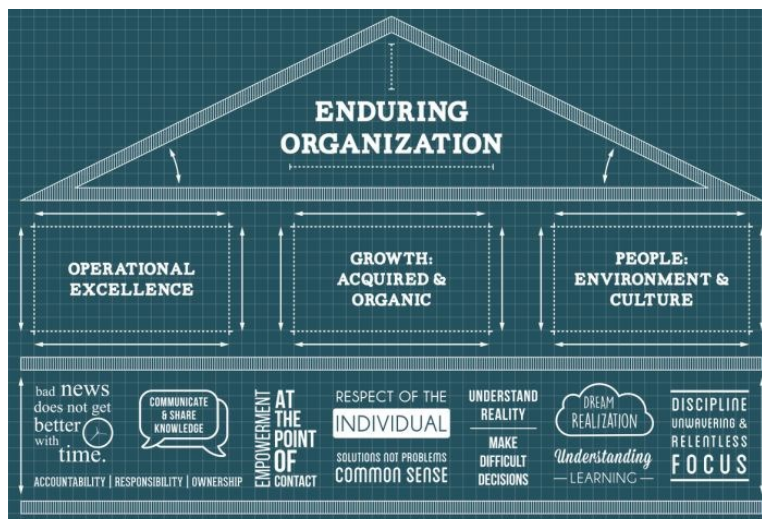
As organizations grow and evolve, it's natural for questions to come up about structure, branding, and affiliation. But while there are multiple moving parts behind the scenes, our commitment to you remains steady. The same people, the same product focus, and the same dedication to independent agencies are still at the heart of everything we do.

What has expanded is our access to broader resources, shared expertise, and long-term investment. Being part of Harris and IAS allows us to collaborate with other insurance-focused solutions, learn from best practices across the portfolio, and continue improving the tools you use every day—with stability and continuity as our foundation.

AGO: Powering Growth for Brokers & MGAs

AGO, part of our IAS family, focuses on delivering solutions to companies and MGAs. Together we bring the strength of a broader network to the industry we serve—while each remains focused on serving our customers in the way they know and trust.

Interested in learning more about AGO or how our solutions work together? [Connect with our team](#)—we'd love to start the conversation.



Just as important, our values are closely aligned. Like us, Harris and IAS believe in:

- Long-term relationships over short-term gains
- Customer-driven innovation
- Operational excellence and reliability
- Empowering teams to serve their clients well

Harris has defined 10 core values that guide how their businesses operate and grow. These values are more than statements—they are a framework for decision-making, customer commitment, and long-term success. They closely mirror how we've always approached our work, which is why the alignment is so strong.

In the coming issues we'll be highlighting each of these 10 Harris values and sharing what they mean in practice for our team and for the agencies we serve. We believe these principles aren't just internal—they're worth sharing because they shape how we support you every day.

They are, in many ways, a guiding light for how we all move forward together: building stronger operations, deeper relationships, and more resilient businesses. Because when our values align, we don't just grow—we endure and thrive together.

At the end of the day, while the structure behind us may be larger, the experience you count on remains the same: a team that understands independent agencies and is committed to helping you grow.



HARRIS

Insurance Agency Solutions

Agency2Go Lite! Take It Further with Agent2Agent

We're excited to introduce **Agency2Go Lite**—a streamlined, modern experience designed to help your team move faster, work smarter, and stay connected whether you're at your desk or on the go. Built on the trusted capabilities of EasyApps, Agency2Go Lite brings those features online with a clean, intuitive interface that keeps your focus on what matters most.

And this is just the beginning.

Our full feature set will roll out this fall, bringing the modern V2 experience to Agency2Go and expanding capabilities to support the agency of the future. Looking ahead, innovations like a mobile app, client portal, and expanded integration opportunities will connect your agency like never before. And for agencies embracing best practices, fully integrated accounting is on the horizon.

But we don't just want you to experience it—we want you to share it.

That's where our **Agent2Agent Referral Program** comes in. If you know another agency that could benefit from a more efficient, flexible way to manage their operations, referring them is simple—and rewarding. When your referral becomes a client, you'll receive program incentives as our way of saying thank you.

It's a natural extension of what makes independent agencies strong: relationships, trust, and shared success. You already know the value of having the right system behind your team—now you can help others gain that same advantage.

Now is the perfect time to start the conversation.

Reach out to our sales team to learn more today.



UPCOMING WEBINARS!

Take advantage of our new webinar series. Several are scheduled that cover accounting, basic workflow, and advanced features.

Some of our upcoming classes are:

- **7/16—Cert Holder Workflow**
- **7/23—Accounting: DB Tracking**
- **8/20—Advanced Cleanup: Strengthening your System for E&O Reporting**

See the [Online Tutorials Page](#) under the WEBINARS heading for registration links!

IN-PERSON EVENTS

August 2nd-4th - Big I Convention in Sun Valley, Idaho

We are getting ready to visit the Big-I in our home state! We're excited to meet some of our local agents and looking for ways we can help you in your day-to-day!

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!

For more information on events email communications@agencysoftware.com with 'Events' in the subject line and we will reply directly with details. Do you have an event you would like to see us at in 2027? Please email us and we will see if we can make it a reality!

Developing the Foundation of ASI's Future

A Conversation with Rob Lutz, Manager of R&D

At Agency Software, the people behind the product are just as important as the technology itself, and Rob Lutz is a perfect example. As Manager of Research & Development, Rob oversees both the development and customer support teams, bringing together technical expertise, practical problem-solving, and a genuine passion for building solutions that work in the real world. While Rob is known for his deep technical knowledge, those who work around him know him just as well for his sense of humor, his steady leadership, and often, the sound of him humming a tune at his desk.

Rob's love of building started long before his professional career.

As a kid, he loved LEGO "Expert Builder" kits and would spend hours putting them together, that is until his dad brought home a Commodore 64 and had him start writing simple programs. "At the time, it wasn't exactly fun, but I did it so I could get back outside and play," Rob recalls. His dad required him to exercise his mind through programming, and the simple reward of getting back outside and exploring nature on his Big Wheel was all the motivation he needed.

Rob credits much of his mindset to his upbringing in Bothell, Washington. His father, a math teacher, built their family home from the ground up.

"That instilled a love of building in me," Rob said. "We also had acres of woods behind our house, so a lot of my creativity came from just being outside and using my imagination."

Today, that appreciation for simplicity and nature still shapes his lifestyle. Now living in North Idaho, Rob enjoys being surrounded by what he calls "things that don't require maintenance," a refreshing contrast to the structured world of software development. His love of the outdoors is well known, though some coworkers might jokingly remember it for another reason. Rob once led a work group on what was intended to be a simple hike that turned into a much longer adventure than expected, leaving more than a few participants wondering if they would ever make it back. It remains one of those legendary Agency Software stories that is still told with equal parts laughter and disbelief.

Rob's path into software development didn't follow a typical script. In fact, he nearly went in a completely different direction.

"In the '90s, I was originally looking at electrical engineering," Rob shared. "My dad encouraged it as a solid career path."

After starting at the University of Idaho, Rob found himself at a crossroads. He wasn't enjoying what he was doing but had a computer science class he always looked forward to. At one point, he even considered switching to forestry, but that idea didn't last long.

"Let's just say Ranger Rick was out," Rob joked.

Fortunately, the credits from his electrical engineering coursework transferred well, allowing him to leap fully into computer science. While his career path changed, his appreciation for nature never did. It remains one of the primary reasons he chose to make Idaho home, living near the Kaniksu National Forest.

After graduating from the University of Idaho in 1999, Rob entered the workforce, starting in fintech with a focus on banking technology.

"I take pride in the fact that I stuck with the field I studied in college. It's not as common as people think."

When asked how he views his role today, Rob offered a perspective that perfectly captures his approach.

"I've always thought of myself as a mechanic, but in the software world," he said. "I enjoy figuring things out, understanding how systems work, and fixing what's broken. I like when there's a clear answer and a logical path to get there."

That mindset has fueled his evolution into a dual leadership role, giving him a unique perspective on both product development and customer success. Rob cares deeply about the people who use our software and the team members who build and support it. He is constantly looking for ways to make life easier for agents and customers while empowering employees to do their best work.

Those who have worked with Rob know that one of his greatest strengths is his ability to understand what customers truly need, sometimes before they can fully articulate it themselves. He has an uncanny ability to translate real-world agency challenges into practical, elegant software solutions. While he may not call himself a genius, many of his coworkers would disagree, especially when they see how quickly he can identify a problem and design a feature that provides meaningful value to customers.

Outside of work, Rob's builder mentality continues to shine through. He and his wife, Kristen, have built a life centered on faith, family, and community. Together they have three grown children and an adopted daughter. Music is also an important part of Rob's life. In addition to the occasional tune humming from his office, he leads worship music at his church, combining his love of music with his desire to serve others.

His passion for building extends beyond software and music. Rob is also an avid enthusiast of classic cars and enjoys spending time tinkering on old vehicles, restoring and maintaining them with the same curiosity and attention to detail that he brings to software development.

Rob's vision is simple: continue delivering high-quality, cutting-edge products that empower both our team and our clients. He values simplicity, not just in software but in life, and brings that philosophy into everything he builds.

Rob is a catalyst for the next chapter of Agency Software. Together with his team, he is building a strong, scalable foundation that not only levels the playing field with our software offerings but positions us to exceed client expectations and continuously evolve to meet their needs.

And whether he's solving complex challenges, mentoring a team, leading worship, restoring a classic car, or simplifying the user experience, one thing is clear: Rob doesn't just build software. He is helping build the future of Agency Software.

