

# NEWSLETTER

**JUNE**  
2025

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## 5 Strategies to Drive Organic Growth

Cross-Sell and Upsell with Intention

Make Retention a Growth Strategy

Let Data Drive Your Decisions

Specialize to Stand Out

Prospect with Purpose

In the past, many insurance agencies saw growth simply by riding the wave of market-driven rate increases. But in 2025, that's no longer enough. True organic growth—the kind that builds long-term value—comes from strategies that deepen client relationships, expand your reach, and strengthen your brand. It's about growing your policy count, not just your premium.

Here are five proven strategies that are helping agencies thrive in today's competitive landscape:

### **Prospect with Purpose**

Growth starts with a steady stream of new leads. Top agencies are using digital marketing, referral programs, and community engagement to consistently attract new business. Data-driven tools help you focus on the right prospects—so your efforts are targeted and effective.

### **Cross-Sell and Upsell with Intention**

Cross-selling is one of the most underutilized growth levers. Whether it's offering personal lines to commercial clients or bundling in employee benefits, there's often more opportunity within your existing book than you think. Recently, a very successful agent told me that his staff upsells at every touchpoint. Train your team to recognize these opportunities and reward collaboration across departments.

### **Make Retention a Growth Strategy**

Client retention isn't just about keeping

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what you have—it's a powerful way to grow. Proactive service, timely renewal outreach, and tools like Net Promoter Score (NPS) help you build loyalty and reduce churn. Getting bad news to clients early may win you that trusted advisor role. Happy clients are more likely to stay—and refer others.

### **Specialize to Stand Out**

Agencies that focus on a niche—like construction, hospitality, or tech—often grow faster. Why? Because they become known as experts. Specialization builds trust, drives referrals, and allows you to tailor solutions that truly resonate with your audience.

### **Let Data Drive Your Decisions**

Data is your secret weapon. Use it to identify your most valuable clients, spot underperforming segments, and track producer performance. With real-time insights, you can adjust your strategy quickly and stay ahead of the curve.

### **Final Thought: Set a Realistic Growth Target**

If you're aiming for healthy, sustainable growth, a good benchmark is a 6–10% year-over-year increase in policy count. This keeps your agency moving forward without overextending your team or resources. Remember, it's not just about growing fast—it's about growing smart.

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Are you looking for ways to improve your reporting processes in your ASI program? A good way to begin is by reviewing the current reports listing and our [Reports tutorials](#). Did you know that many reports requests can be satisfied by making a request to support. To start a request simply email the details to [support@agencysoftware.com](mailto:support@agencysoftware.com).

### **Are you paying too much for phone service?**

Our new Harris partner, Simplified Networks, offers great modern solutions and competitive pricing. [Reach out](#) to find out more about our partnership with innovative potential!

## What's happening at Agency Software

### **IN-PERSON EVENTS**

#### **June 8th–10th - IASA Xchange in St. Louis, Missouri**

*Mark W. will be with John and Keith from our IAS sister company, AGO. Stop in to chat and hear about what's happening in our group!*

#### **June 18th–20th - FAIA Convention in Orlando, Florida**

*We are extremely excited to return to Orlando and visit our friends in sunny Florida! Drop by booth #423 to say hi to Moria, Frank, Conner and our special guest Ziggy from our new partner, Docubee. Come see what all the 'buzz' is about!!!*

#### **September 22nd-24th - UFAA National Convention in Las Vegas, Nevada**

*Mark A. and Moria will be back in Vegas to see our friends at Farmers! Stop in to say Hi and see how we can help you in your journey to success!*

#### **December 2nd-4th - HCTC in San Diego, CA**

*We have heard from you and are excited to gather for our first in-person training and networking event. HCTC will be held in San Diego on December 2nd through 4th and will focus on best practices for building an enduring organization, as well as a chance to spend some time with Agency Software staff and other partner agents. This is an excellent opportunity to take our partnership to the next level!*

*For more information email [communications@agencysoftware.com](mailto:communications@agencysoftware.com) with 'HCTC' in the subject line and we will reply with details.*

# Reporting Best Practices

*Why the right reports—run at the right time—can make all the difference.*

Running a successful agency isn't just about writing new business or keeping clients happy (though those are big parts of it!). It's also about having a clear view of what's happening inside your agency—what's working, what's not, and where you can grow. That's where reporting comes in.

Here's a breakdown of some core monthly reports every agency should be running regularly—and why they matter.

## **New Business Report**

This report shows how much new business you're bringing in and who's writing it. It's your pulse check on sales momentum and a great way to spot your top producers. Add a demographics field for 'Client Source' to add to the report to find your most effective marketing channels.

## **Expiration Report**

Retention is the backbone of profitability, and reviewing expirations early helps you track renewals, cancellations, and non-renewals—so you can step in early with accounts that might be at risk.

## **Book of Business Report**

Think of this as your agency's portfolio snapshot. This series of reports show your active policies, premium by line of business, and carrier mix. It's a great tool for spotting concentration risks or areas where you can diversify or grow.

## **Financial Statements (Income & Expense and Balance Sheet)**

These reports ensure data accuracy and helps to gauge business performance. AgencyPro's accounting features utilize policy data and collect all entry into these reports that can

According to MarshBerry's *Perspectives for High Performance*, the top 25% of agencies in organic growth prioritize regular reporting and performance tracking.



help you see all angles of your business and have peace of mind from a managerial view.

## **Claims Activity Report**

Claims are where the rubber meets the road. This report tracks open and closed claims, how long they take to resolve, and their severity. It's a great way to monitor service quality and spot trends that might need attention.

## **Cross Marketing Report**

Want to grow without chasing new leads? This report helps you identify clients with only one policy and shows where you have opportunities to deepen relationships and increase revenue.

Most of these reports you will find available in the standard reports list, but if you are needing to modify them to suit your particular need, our support representatives are standing by to assist. Simple custom reports, and report modifications can be done without cost, and more complex requests can be made as custom development.

You don't need fancy tools or cutting-edge tech to run these reports—just a consistent process and a commitment to using the insights they provide. Start with the basics, build a rhythm, and let the data guide your decisions.

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*Interested in learning more about AgencyPro's complete agency accounting? Reach out to our [sales team](#) to find out more!*

## Featured Employee: Conner Hageneder

At Agency Software, we believe that great service starts with great people—and Conner Hageneder is a shining example of that philosophy in action. As a Sales and Customer Satisfaction Representative, Conner brings a unique blend of care and resourcefulness to every client interaction.

Originally from Roxbury, New Jersey, Conner grew up in a tight-knit community where everyone knew your name—and your business. That sense of connection and accountability has stayed with him, even as he moved around the Northeast for school and family. Whether in Vermont or New Jersey, Conner has learned to adapt quickly and embrace change, a skill that serves him well in the dynamic world of sales and support.

As a kid, Conner dreamed of being a bullpen catcher in Major League Baseball—part of the team, soaking in the camaraderie, without the pressure of the spotlight. That same team-first mentality is what makes him such a valued member of our crew. His first job as a dishwasher at Cambiotti's Tomato Pie Café taught him the importance of teamwork and communication—lessons he carries into every client conversation today.

Conner's path to sales was a natural one. With an easygoing style and a knack for storytelling, he helps clients see the best in our solutions. Whether he's finding the right solution for our customers or guiding a new prospect, Conner's goal is always the same: build trust through transparency and help clients succeed.

Wearing two hats—sales and customer care—means no two days are the same for Conner. His sweet spot? Late mornings to early afternoons when conversations flow and connections are made. He thrives on the camaraderie of the team and the satisfaction of helping clients reach their goals.

One of Conner's proudest achievements came long before his time at Agency Software—earning a



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is Here!



We are excited to announce our new integrated eSignature feature in Agency2Go! Securely send, track, and manage legally binding eSignatures. Powered by our partner Docubee, we can modernize your workflow and keep clients smiling with a seamless, paperless signing experience.

Find out how to get started by reaching out to [sales@agencysoftware.com](mailto:sales@agencysoftware.com)!

leadership award at the U.S. Naval Academy during baseball training. More recently, he recalls his first sale here as a turning point: a tough start to a continual conversation that turned into a lasting client relationship, built on patience and persistence.

Conner is more than just a sales rep—he's a team player who supports colleagues, streamlines processes, and shares knowledge freely. He describes the culture at Agency Software as one of the best he's experienced, with leadership that truly invests in growth and learning.

Off the clock Conner visits the gym daily, enjoys playing poker with friends, and exploring the great outdoors. He's a car enthusiast, part of the RV community, and has a deep appreciation for the changing seasons—especially spring. His dream? For him and his newlywed wife to take their work on the road, living and working from an RV while exploring the country's national parks.

Conner is excited about the future—both personally and professionally. He's eager to deepen his sales knowledge, learn more about development, and sharpen his listening skills. His advice to newcomers in sales? "Don't give up. The first sale is the hardest but tomorrow is a better day."

Friendly, outgoing, and genuinely committed to helping others, Conner is someone you'll be glad to have on your side. Whether you're a longtime client or just getting to know us, chances are you'll hear from Conner—and when you do, you'll know you're in good hands.

### 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.*