# NEWSLETTER

## MARCH
### 2026

*In this edition:*

**ACORD Technology and Automation**

**Introducing Agency2Go Lite**

**Featured Employee: Rich King**



## Streamlining Your Workflow
*Acord Technology and Automation*

Independent agencies face growing demands for speed, accuracy, and compliance. While ACORD provides the industry standards that keep data consistent, those standards alone don't solve the day-to-day challenges of managing certificates, renewals, and client requests. That's where Agency Software steps in—offering practical tools that automate workflows and eliminate unnecessary complexity.
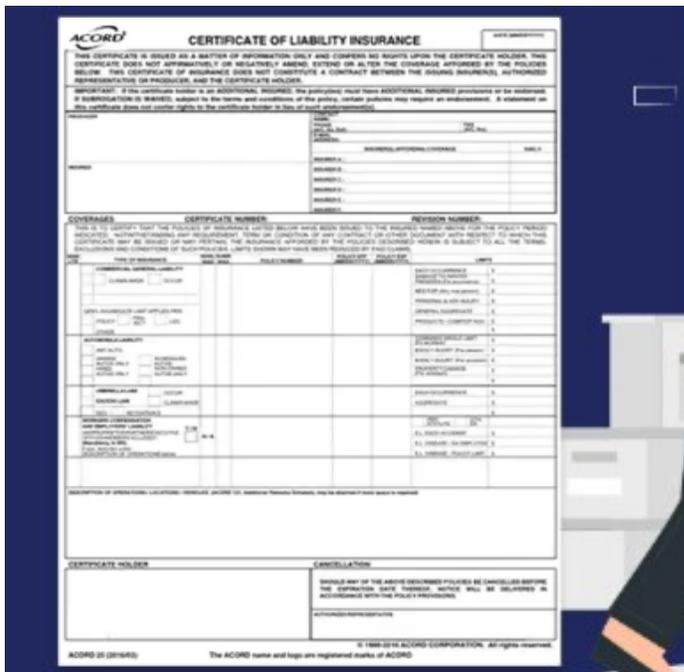
**Why Agency Software Matters**

Modern agency platforms do more than store data—they transform how you work. By integrating your client and policy information into a single system, Agency Software reduces manual entry, minimizes errors, and frees up your team to focus on what matters most: serving clients. These "Aha! Moments" happen when agencies realize how much time and risk they eliminate by automating repetitive tasks.

**Certificate Holder Workflow: The Game-Changer**

Managing certificate requests manually is one of the most time-consuming processes in an agency. Every request means pulling data, verifying coverage, and issuing documents—often under tight deadlines. Agency Software's certificate holder workflow changes the game:

**Automated Data Pull:** Instantly access

policy details from your AMS.

**Real-Time Tracking:** Monitor certificate issuance and holder updates without spreadsheets.

**Compliance Built-In:** Reduce E\&O exposure with accurate, ACORD-compliant forms.

The result? Faster turnaround, improved accuracy, and simplified audits. Agencies using this workflow report significant time savings and fewer client complaints.

## ACORD vs. Agency Software: What's the Difference?

ACORD plays a vital role in the industry by setting standards and providing forms—but access comes at a cost. Agencies must purchase an ACORD license to use those forms, and the license doesn't include automation or workflow tools.

Agency Software gives you the advantage of::

- **Automation Built-In:** From certificates to renewals, everything is streamlined.

- **Seamless Email Integration:** Send directly from your system for a unified experience.

- **One-to-many holder feature:** Load holders into an easy to fill and copy menu.

Bottom line: ACORD sets the rules. Agency Software gives you the tools to play—and win.

## Ready to See It in Action?

Join our upcoming webinar to learn how certificate holder workflows and automation can transform your agency. Follow us on social for tips, success stories, and video demos. **Visit [Online Tutorials](#) for webinar registration links.**

## NEW BILLING!

*We're gearing up for some much-needed billing system modernization. As a Harris company, Agency Software is implementing a best practice and moving to a billing portal system called HighRadius.*

### How does this effect you?

In the next billing cycle you will be receiving an email from noreply@harriscomputer.com. This email will contain an account activation link that will guide you through setting up your billing account. From this account you will be able to view your past invoices, make payment on your account, and even change your primary and secondary agency information.

### What do I need to do?

While you watch for this email, be sure to trust the domain of 'harriscomputer.com' in your email settings. *If you feel like you should have received your billing you can reach out to us at sales@agencysoftware.com, or contact us at 800.342.7327.*

# Agency of the Future
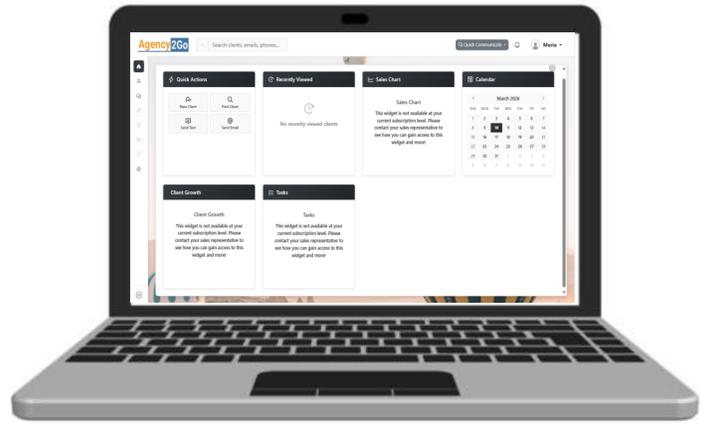## *Introducing Agency2Go Lite*

In our last edition, we teased what's next for agencies looking to simplify operations without sacrificing power: Agency2Go Lite. This web-based version of our popular EasyApps product is designed with flexibility and accessibility in mind. Whether you're in the office or on the go, Agency2Go Lite delivers a streamlined experience that's perfect for **young agents and growing agencies.

## Why Agency2Go Lite?

Starting an agency comes with enough challenges—your technology shouldn't be one of them. Agency2Go Lite offers the essential tools you need to stay competitive, all at a special introductory Lite pricing that makes it easy to get started.

## Key Features You'll Love:

- Customizable Dashboard: Configure widgets to fit your workflow.
- AI Helper: Smart assistance for everyday tasks.
- Enhanced Security Standards: Peace of mind for you and your clients.
- Fresh Look & Improved Workflow: Modern design for a better user experience.
- Quick Upgrade Path: Seamlessly move to the full version when you're ready.
- 2-Way Texting: Communicate with clients faster and more effectively.



At Agency Software, our scalable solutions are designed to meet agents where they are—whether you're just starting out or ready to expand, we provide the tools to grow at your pace.

## Already Using EasyApps?

If you love EasyApps but want the flexibility of a web-based platform, Agency2Go Lite is your next step. No more being tied to a single device—access your tools from anywhere, anytime. The industry is evolving, and so are client expectations. Agents need solutions that enable remote work without sacrificing functionality. This also has the advantage of reducing IT overhead by eliminating local installs and updates, and offers real-time accessibility for teams and clients alike.

Agency2Go Lite isn't just a product, it's a future-ready solution for agencies that want to grow without complexity. With its lightweight design and powerful features, you'll have everything you need to start strong and scale with confidence.

## Reserve your spot for early access and special Lite pricing today!

*Are you using Agency2Go today? You are already benefiting from some of these upgrades, but more are coming soon! We will schedule the next generation release toward the end of summer 2026. Stay tuned for the exciting developments to come and reach out to support with any questions!*

## MAKE THE MOST OF YOUR INVESTMENT!

Take advantage of our new webinar series. Several are scheduled that cover accounting, basic workflow, and advanced features. **See the Online Tutorials Page under the WEBINARS heading for more details and registration links!**

AGENCY SOFTWARE'S
# AGENT2AGENT
# REFERRAL PROGRAM

REWARDING OUR LOYAL CUSTOMERS
FOR SPREADING THE WORD
## SHARE. EARN. GROW.

# Introducing Agent2Agent!

We're excited to announce **Agent2Agent**, Agency Software's new **Customer Referral Program** created to reward you for sharing the value of our solutions with your peers in the insurance industry.

### Why Agent2Agent?

If Agency Software has helped your agency streamline operations and deliver better service, the best compliment you can give us is a referral. And now, we want to thank you for spreading the word!

### How It Works

Refer another agency or insurance professional to Agency Software.

Once your referral signs up and completes onboarding, you'll receive a discount toward your future maintenance invoice.

It's a win-win: help others discover a solution that works while earning something in return.

### Program Highlights

Your referral must be a new Agency Software customer who has not previously used our services.

Discounts are applied after your referral completes onboarding.

Rewards are based on the referred agency's setup and applied to your maintenance invoice.

### Ready to Get Started?

This is a great opportunity to save—and if we're doing a great job for your agency, word of mouth is the best advertisement.

Reach out to us at sales@agencysoftware.com to learn more about Agent2Agent and start earning rewards today!

# 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!*

### 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!*

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*For more information on events email communications@agencysoftware.com with 'Events' in the subject line and we will reply directly with details.*

## Paying too much for phone service?

Our new Harris partner, Simplified Networks, offers great modern solutions and competitive pricing.

Reach out to sales@agencysoftware.com to find out more about our partnership with innovative potential!

# Lacing Up Success: The Rich King Story

If you've spent even five minutes with Rich King, you've probably noticed his contagious energy, and the way he makes everyone around him feel like part of the team. Rich joined Agency Software a year ago as an account executive. Since day one, he has been a bright spot in every room—full of ideas, grounded in character, and dedicated to true customer care.

Rich grew up in Chicago before heading "just far enough away" for college at Ohio State. College is where he met his wife, Ang, and started building the life he treasures today with their two kids, Layla and Rich IV, and their much-loved dog, Rajah. Home is their happy place, and Rich lights up talking about family, particularly on days when school is in session. No doubt they are his inspiration with his favorite moments being simple times building Legos or playing at the rec. Rich likes spending evenings cheering on local high school basketball or volunteering with a youth group.

Before joining the world of sales, Rich once dreamed of opening a shoe store with a college buddy. His dad vetoed the dream due to "lack of retail experience"—a story Rich laughs about today, and to get some retail experience he took a job at JC Penney in the home department, where he grew his skills at listening and relating to the customer. Later he returned to school for his MBA, and experimented with flipping houses. By late 2019, he'd grown a rental business that lasted six years before COVID slowed expansion. He then joined Orange Barrel Media in marketing and sales, though constant travel eventually pulled him back toward roles that gave him more time with his growing family.

At Agency Software, Rich has found a team culture that feels like home: small, inclusive, and supportive. He especially loves hackathons for the morale and creativity they cultivate. His colleagues will tell you he brings far more than sales skills to the table—his marketing instincts, communication savvy, and endless enthusiasm fuel much of the company's outreach and energy.

When it comes to customers, Rich believes the secret is simple: communicate, communicate, communicate. He prides himself on truly knowing where agents are in their journey and what they need next. To him, the reason customers choose Agency Software comes down to one thing: support that shows up when they need it most.

Looking ahead, Rich is excited about what the company's roadmap will deliver and how it will elevate the client experience. Personally, he's focusing on faith, finances, and healthier boundaries with technology—growth areas he embraces with characteristic optimism. His philosophy for anyone starting in sales is classic Rich: stay positive, keep your head up, and don't get in your own head.

And one fun fact? Rich once owned over 500 pairs of shoes. Today he's down to about 450 and intends to stay under 500. Progress!

One thing is certain: Rich's energy, ideas, and commitment to teamwork make him a true asset to Agency Software.

## Would you like a convo with Rich?

He would love to talk about you and your agency's needs. Follow this link to set some time on Rich's calendar.

## OUR COMMITMENT

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