NEWSLETTER

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Why Cloud-Based Systems are a Game-Changer	eSignature Efficiency Booster	Featured Employee: Justin Bradshaw

In today's fast-paced insurance landscape, agility, security, and scalability are no longer luxuries—they're necessities. For P&C agencies, cloud-based management systems are proving to be a transformative force. Here's why making the switch to the cloud isn't just a tech upgrade—it's a strategic advantage.

Access Anywhere, Anytime - Cloud-based systems allow your team to access client data, policy documents, and workflows from any device with an internet connection. Whether your agents are in the office, working remotely, or meeting clients on-site, they can stay connected and productive. An agent on the road can instantly pull up a client's policy details and issue a certificate of insurance—no need to call the office or wait until they're back at their desk.

Enhanced Security & Compliance - Our cloud platform offer enterprise-grade security features like encryption and automatic backups. This helps agencies stay compliant with data protection regulations and reduces the risk of cyber threats. Security patches (and program updates with Agency2Go) are applied automatically, so you're always protected with the latest safeguards.

Seamless Integrations - Cloud-based systems are able to integrate easily with other tools—CRM platforms, quoting engines, e-signature solutions, and more. This creates a unified tech ecosystem that reduces manual entry and improves data

accuracy. You will see us begin to build these partnerships with integration partners, as well as carriers in our Agency2Go system.

Scalability Without the Headaches - As your agency grows, your system will grow with you. You are able to scale effortlessly—no need to invest in new servers or IT infrastructure. Whether you're adding new users, locations, or lines of business, the cloud adapts to your needs.

Lower Total Cost of Ownership - Avoid the upfront costs of hardware and reduce ongoing maintenance expenses. Most operate on a subscription model, making budgeting predictable and eliminating surprise IT costs.

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Ready to Make the Move?

If your agency is running on-premises software, now is the time to explore our cloud-based options. The benefits go far beyond convenience—they empower your team, protect your data, and position your agency for long-term success.

Contact our friendly sales team (sales@agencysoftware.com) to discover our fully web-based system, Agency2Go, or consider transitioning your current application (EZAgent, AgencyPro, and AgencyPro SQL) to our partner, EME Cloud.

eSignature is Here!   docubee

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!

WE WANT TO HEAR FROM YOU!
We have begun to send regular partner surveys to better understand your needs, to shape our product roadmap, and to ensure we're delivering the best possible experience. Your feedback will directly influence new features, improvements, and how we support your agency. So keep your eye on your inbox—your voice matters!

Are you looking for more ways to get involved? One way is to meet us at HCTC in December! For other ways to voice your needs reach out to us at communications@agencysoftware.com.

IN-PERSON EVENTS

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 with 'HCTC' in the subject line and we will reply with details.

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Do you have an event in mind that you would like us to attend? Send in your suggestions!

Efficiency Booster!
How eSignature Can Supercharge the efficiency of P&C Agencies

In the competitive world of P&C insurance, time is money—and client experience is everything. That's why more independent agencies are turning to eSignature and renewal automation features within their management systems. These tools don't just streamline operations—they transform how agencies serve clients, manage workloads, and grow revenue.

Gone are the days of printing, scanning, and mailing documents. With integrated eSignature tools, your agency can:

Speed up policy binding: Clients can sign applications, endorsements, and other documents instantly from any device.

Reduce errors: Pre-filled forms and guided signing reduce the risk of missed fields or incorrect information.

Improve client satisfaction: Clients appreciate the convenience of signing from home, work, or on the go.

Enhance compliance: Digital audit trails ensure every signature is time-stamped and legally binding, and are automatically saved in the Attachments area of Agency2Go.
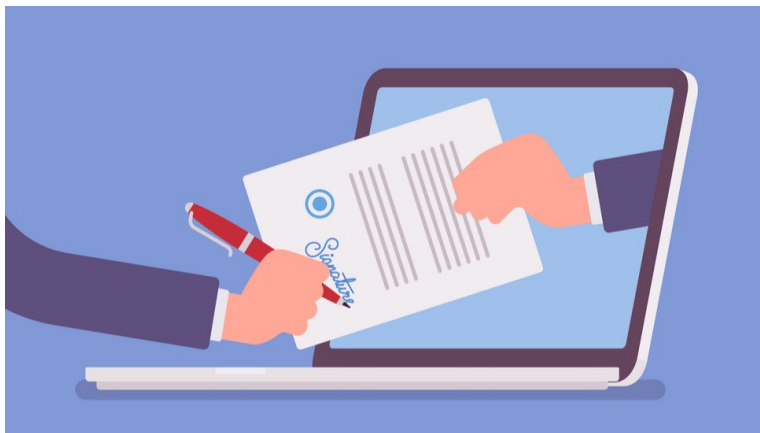
Real-World Impact: Agencies using eSignature report turnaround times dropping from days to hours—or even minutes.

The Power of Integration

When eSignature is built into your agency management system, the benefits multiply:

- No switching between platforms
- Centralized document storage
- Automated workflows
- Better visibility for managers and producers alike

Bottom Line: More Time for What Matters

By automating routine tasks and simplifying client interactions, your team can focus on what really drives growth: building relationships, advising clients, and closing new business.

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Ready to streamline your agency's operations? Reach out today to discover our new eSignature!

> "My advice to other agents would be to stop printing papers. Stop using physical documents and sending things through the mail. Switch to an online platform for all filing and transactions. This will save you a lot of money, save the environment, and also save time that you can use to sell more."
> ~Safeco: Agent of the Future Initiative

PARTNER CORNER

We are looking for ways to better serve you. Developing our partnerships not only gives you opportunity for cost-savings, but may provide ways to make your day more efficient.

Are you 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!

Looking for a mailer service?

AQS specializes in providing exclusive, never-shared leads paired with precision-timed quoting and mailing services. Reach out to our sales team for a connection and more information!

Featured Employee: Justin Bradshaw

From the trails of Q'emlin Park to the depths of a Dungeons & Dragons campaign, Justin Bradshaw brings curiosity, creativity, and a problem-solving mindset to everything he does—including his role as a Software Developer at Agency Software.

A native of Post Falls, Idaho, Justin appreciates the region's seasons (except winter!) and the abundance of outdoor activities. He's an avid hiker and enjoys exploring local trails.

Young Justin dreamed of a military career and even aimed for West Point, but asthma led him to pivot. His natural curiosity and love for science were evident early on, and at the age of 16, taking college chemistry, Justin placed in the 99th percentile in the national standardized test. When asked what historical figure he would wish to meet, his answer was Nikola Tesla for his visionary thinking, and Marie Curie for her groundbreaking work in chemistry and her resilience as a woman in science.

Justin's first job was teaching tennis for the U.S. Tennis Association, and early-on he exercised his leadership skills directing a summer tennis camp. A friend in his scout troop introduced him to the theater in his early teens (and he continues his involvement today). Spending time on stage and behind the scenes with CYT and Spokane Civic Theatre, he enjoys playing the villain. His favorite part played was Hades in Hercules, and he says that "Prince Charming is not me," and that "it's more fun to play the bad guy". The theater is where he met his wife; they were middle-school sweethearts who were married in 2019.

Justin majored in Psychology at the University of Idaho, and when he joined Agency Software through our internship program, he was heading toward a career in law enforcement and preparing for the police academy. Thankfully for us, Justin began to enjoy the software development role. His natural curiosity and love for the scientific method—testing, failing, tuning—makes him a perfect fit for R&D. He describes the work as "mentally challenging," and thrives on the daily opportunities to learn and grow.

When asked about how he views Agency Software's company culture Justin creatively replied with a list of adjectives; "healthy, caring, innovative, resourceful, kind, thoughtful, curious". He appreciates the Harris philosophy of incremental improvement, the freedom to fail forward, and to seek lessons learned. He appreciates the small company feel, with the best practices frame that Harris provides. He also believes what sets Agency Software apart is our genuine care for our clients and the impact our work has on them.

Outside of work, Justin enjoys board games, weekly D&D sessions with friends, and pickleball matches with his in-laws. After a busy week, he loves going on walks and dates with his wife. He's excited about personal and professional growth, especially as many of his friends are entering new life stages alongside him.

His advice to newcomers in R&D? "Persevere and remain curious. Keep trying and don't give up." His favorite quotes reflect his bold spirit: "If you want peace, you have to fight for it" and "Fortune favors the bold." Justin Bradshaw is a testament to the power of curiosity, resilience, and a little bit of villainous flair—and we're lucky to have him on our team.

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.