

Independent Agent Peak Performance

Driving growth from prospecting through retention

Relationship frustration

Today's Independent Agent understands the importance of a personalized customer service approach in order to retain customers in the competitive marketplace. Without having full-time IT on staff and an unlimited budget, it can often feel overwhelming trying to figure out a technology solution that drives your business goal of service differentiation while still supporting balanced operational costs and process efficiencies.

The modern alternative

The good news is that modern tools make it possible to provide secure, customer focused service in a way that also improves the efficiency of overall operations and business processes for the independent agent.

Benefits of this approach include:

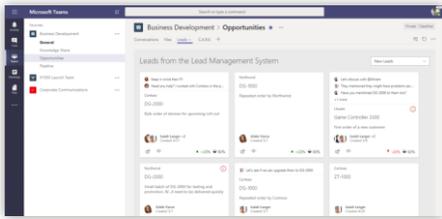
- Streamlined Agent experiences automate repetitive work so agents can focus on business goals rather than on looking up and copying data.
- Building on Office 365 makes it easy to provide secure mobile access using infrastructure and that's already in place.
- Customer communication is secure and effective in industry-leading collaboration tools like Microsoft Teams and SharePoint.

"For some – especially the 33% of US agencies with no digital strategy whatsoever – 2020 has been a year of scrambling for tools and technology to connect employees and customers while sheltering in place was on. While temporary fixes to manage this sudden shift may sustain agencies for a short time; the pressure is now on to create paths forward to navigate a post-pandemic business model that supports the digital reality we're living in today."

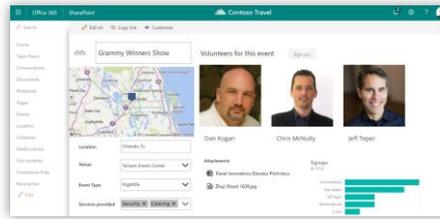
Bethan Moorcraft
Insurance Business America
03 November 2020

Envision the possibilities

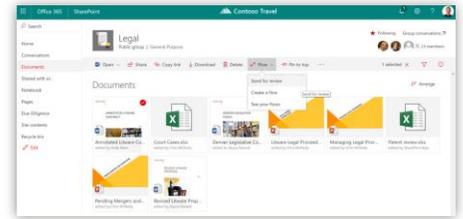
- One secure platform that provides contact management, conferencing, email, and document/file sharing with your customers.
- Tracking of prospects and opportunities that integrates smoothly with your email and keeps your sales pipeline full
- Access your files and information from any device, anywhere in the Microsoft Cloud
- Collaborate easily with your team to turn around proposals and offerings – keeping the business development process moving efficiently



Custom tab in
Microsoft Teams



Custom forms with
PowerApps



Streamlined collaboration
with Power Automate

Return on investment

- Eliminate the need for managing, learning, and paying for several costly applications
- Streamline your efficiency by using the familiar Office platform
- Protect your business and customers, using the security built into the platform

*Corporate level
responsiveness –
within small business
operations*

"Agencies that shift from being data-generating organizations to being data-powered drive greater employee productivity, identify new and renewal sales opportunities, and focus more time on the most profitable insurer relationships."

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