

Winning@Customer Retention

Customer Service and Retention Technologies

Here is a list of technologies and links that can help agencies with customer service and retention. PIA National does not endorse or recommend any of the technologies and encourages agencies to get references and conduct evaluations before selecting solutions

If you're aware of a solution that should be included here, please let us know at (ADD EMAIL ADDRESS)

Agency Management Systems

Name: AgentDesk

What the company says: AgentDesk is the affordable and effortless agency management system software that allows insurance agencies to concentrate on selling instead of managing.

Link: <http://www.agentdesk.net>

Name: Applied Systems

What the company says: Recognized as a pioneer in insurance automation and the innovation leader, Applied is the world's largest provider of agency and brokerage management systems. By automating the insurance lifecycle, Applied's people and products enable millions of people around the world to safeguard and protect what matters most. Manage day-to-day business operations with maximum productivity. Build and manage an entire business in a single application. Dynamically evaluate competitive healthcare plans in real time. Rely on the only cloud purpose-built for the insurance industry. Get more done with a rich, business-class email experience.

Link: <https://www1.appliedsystems.com/en-us/>

Name: Evolution Agency Management

What the company says: Evolution Agency Management is a company that offers an agency management software platform. Our Goal is to bring a state-of-the-art agency management system within reach of all agencies in the US. Diary system/ToDo List, Notes, History, Policy Download, Direct Bill Commission download, Rating Integration, Full Accounting, Policy Details, Multi-office capability, Hosting, Real Time Interface, Contact Management, Document Management, Word Processing/Mail Merge.

Link: <https://evo-ams.com>

Name: EZLynx

What the company says: EZLynx provides innovative insurance software that helps streamline your agency's workflow. You can bundle products to supercharge your agency's productivity or purchase products individually to meet the unique needs of your business. Each product integrates with our comparative rater and agency management system to provide a single platform to manage customers through their full life cycle. From real-time home and auto quoting on your insurance agency website to email marketing, EZLynx has a solution for you. Better together. EZLynx has officially joined the Applied family. We will continue to provide the innovative products and customer service you have come to expect. Bundled products to supercharge your agency. Enjoy seamless integration for your agency's website with products like EZLynx Consumer Quoting and EZLynx Client Center, enhancing the overall consumer experience.

Link: <https://www.ezlynx.com>

Name: HawkSoft

What the company says: HawkSoft is a leader in management systems for independent insurance agencies that want effective workflows and a delightful experience for staff and policyholders. Created by independent agents, HawkSoft continues to evolve as a cutting-edge system that powers thousands of agencies. HawkSoft offers the following promise to insurance agents: your investment in HawkSoft will pay for itself in the first year.

HawkSoft delivers an all-inclusive management system to grow your book of business with the ease-of-use that allows your staff to quickly learn and apply the tools. HawkSoft's complete Personal and Commercial Lines feature-set delivers the most value for your management system investment. The intelligent automation built into HawkSoft allows you to automatically learn of clients that need urgent attention. The auto-documentation system ensures every client interaction - whether it is a phone call, incoming email, text message, or an email campaign - is logged as history. Check your agency vitals with our Agency Intelligence dashboard. You can also create custom reports at any time using our Report Generator. Commission Importer saves hours of work and hundreds of dollars in bookkeeping expenses every month. Import Excel or CSV commission statements with fields automatically mapped to HawkSoft's accounting system.

Link: <https://www.hawksoft.com>

Name: Jenesis Software

What the company says: Jenesis is a cloud-based solution that helps insurance agents manage personal and commercial lines and obtain new potential customers. Key features include claims management, rating engine, policy processing and reinstatement tracking. Designed for independent insurance agencies, Jenesis comes with an Association for Cooperative Operations Research and Development (ACORD) library, which includes both prefilled and fillable PDF forms. Its drag-and-drop interface allows users to create, edit and import image attachments from client profiles and share them across the team. Additionally, the solution enables enterprises to automate accounting tasks and manage remittances for customers.

Link: <https://www.jenesissoftware.com/insurance-agency-management-systems/>

Name: Newton by Agency System

What the company says: Newton by Agency Systems provides insurance agencies of all sizes with reliable, full-featured insurance agency management software systems for commercial and personal lines retail agencies, brokers, and general agencies. Even the most stable agency management system provider is of no value unless they are willing to commit all of the resources required for a successful transition, including the unlimited training and support your agency needs. Experience proves that some agencies require more individual attention than others, and you should demand that support without question and without additional fees. We've been diligent in creating intelligent agency management software that will empower you to work smarter and more efficiently. Our innovative user interface offers capabilities and design features unlike anything insurance agencies have seen before.

Link: <https://agencyssystems.com>

Name: Nexsure

What the company says: Nexsure is a comprehensive, Web-based application engineered for the Web from the ground up and provided as a SaaS ("Software-as-a-Service") solution. Nexsure offers robust contact management, sales force automation, campaign design and management (marketing), advanced workflow, standard (property and casualty, life and health, benefits) and custom lines of business, policy life cycle management, CRM, and multi-office accounting and reporting. It offers optional modules for Enterprise Reporting (Data Warehouse), Enterprise Application Integration, client and retail agent portal access, and SubmissionSuite (on-line submissions). Nexsure is a scalable,

cloud computing solution, based on the Microsoft technology platform (Web development utilizing the Microsoft .NET platform, with Microsoft SQL Server as its database engine), and takes full advantage of the XML data format. Nexsure's offerings reflect XDimensional's commitment to providing business solutions that improve and enhance the way the insurance industry conducts business.

Link: <https://xdti.com>

Name: Partner Platform

What the company says: Easily manage the entire life-cycle of your agency's client relationship from pre-sales to servicing to renewal in a unified system that has sales and marketing, client, policy, and financial management, agency-branded mobile app, integrated text messaging, data analytics, web solutions, and integrations with third-party tools and industry partners.

Link: <https://sispartnerplatform.com>

Name: Special Agent

What the company says: Save time and money while increasing your productivity and sales volume with Special Agent, the complete insurance agency management software system.

Link: <https://specialagent.com>

Name: Vertafore

What the company says: Vertafore's solutions provide end-to-end connectivity across the distribution channel, improve the client and agent experience, unlock the power of data, and streamline essential workflows to drive efficiency, productivity, and profitability for independent agencies, MGAs and carriers.

Identify opportunities for growth and make data-driven decisions with actionable information about your customers and business. Become an expert in areas outside of your current business with access to the industry's aggregated knowledge base. Effectively manage your business with complete integrated solutions for your agency's internal operations and information. From customer and policy management, to agency licensing, reference materials, and real-time rating, this comprehensive platform is designed to make the modern agency more profitable.

Link: <https://www.vertafore.com>

Name: Veruna

What the company says: Veruna is a technology solution that leverages Salesforce.com CRM, agency management, download, Acord, reporting and analytics and configurability of Salesforce to enable independent insurance agents and brokers to KNOW their customers in order to make actionable insights to GROW their businesses. Veruna gives you unprecedented control of not only your agency management system but your businesses' growth. Create automated tasks and reminders for managing customer relationships, remarkets, lost business, or expanding coverages to meet your insureds' needs. Automate back-office tasks to get you back out in front of your customers.

Link: <https://www.veruna.com>

Name: Xanatek

What the company says: Xanatek is an advanced, cloud-based agency management system. By using this intuitive system based on the latest technology — bundled with unlimited training and support — agency staff can access critical client data, process new policies, changes, and service clients, quickly, easily, and efficiently.

Link: <https://xanatek.com>

Name: Zywave

What the company says: Leverage a dynamic AMS that delivers a comprehensive platform that consolidates workflows and processes into a single, unified platform so users can spend more time on sales, retention, and creating the most efficient business possible by leveraging technology that provides superior insights into every aspect of their benefits operations.

Link: <https://www.zywave.com/sales-cloud/agency-management-system/>

Analytics

Name: CloudFactory

What the company says: CloudFactory is a global leader in combining people and technology to support the AI development lifecycle. Their human-in-the-loop AI solutions, powered by more than 7,000 expertly trained and managed data analysts, are trusted by AI leaders at 700+ companies, including Microsoft, Mitsubishi, Ibotta, Expensify, and Matterport. Founded in 2010 and with offices on four continents, CloudFactory is on a mission to create economic and leadership opportunities for talented people in developing nations.

Link: <https://info.cloudfactory.com>

Name: DONNA

What the company says: **DONNA** is an Artificial Intelligence and Data Analytics Platform for Independent Agencies. Our mission is to enable independent agencies to leverage vast data sets that they already own in order to deliver a superior customer experience to their policyholders. DONNA is an example of how expensive and complex artificial intelligence technology, previously only accessible to large players in the insurance industry, is now available to agencies of all sizes. DONNA is integrated with leading Agency Management Systems thereby eliminating the need for complex IT integration to get started. **DONNA** is powered by Aureus Analytics. Aureus was founded in 2013 with operations in the United States and India.

Link: <https://www.aureusanalytics.com/donna>

Appointment Scheduling

Name: Appointlet

What the company says: Appointlet is a passionate software company that is bringing appointment scheduling into the 21st century by modernizing the way businesses interact with their customers. Streamline your scheduling workflow, get the meetings you want when you want them, and deliver a scheduling experience that feels professional.

Link: <https://www.appointlet.com>

Name: Arrangr

What the company says: Arrangr, the knowledge leader in "intelligent" scheduling, has at its core a one-of-a-kind universal hub for arranging a meeting. This "hub" eliminates the frustrating back-and-forth texts, emails, and phone calls with one simple to use application. To schedule a meeting, one can simply connect ANY calendar, suggest some dates and times, a location, or a preferred method such as a conference call or video conference. No more separate emails with conference call PINs or links for video conferences. No more discussions to choose the perfect location to hold a meeting. Using a best-of-class model, Arrangr integrates, connects and streamlines all these tasks into

one straightforward and easy-to-use application - while keeping a fine-tuned eye on speed, simplicity, and clarity. In as little as 30 seconds, and just a few clicks, a complete meeting with all its moving parts can be arranged. And soon, with our proprietary AI engine, Arrangr will anticipate your needs when and where you need them.

Link: <https://arrangr.com>

Name: Calendar

What the company says: Calendar is the foundation for smart time management, bringing you more fulfilling work days and clarity to make better decisions. You'll have the ability to allow anyone to choose and schedule a meeting directly to your Calendar. Your Calendar will protect you from any pre-existing or conflicting meetings being scheduled at the same time. All you have to do is send them your customized personal scheduling link.

Link: <https://www.calendar.com>

Name: Calendly

What the company says: Calendly helps individuals, teams, and organizations automate the meeting lifecycle by removing the back and forth with scheduling. Calendly's cloud-based platform offers a new layer of the modern digital technology stack by connecting with critical tools to automate scheduling workflows, creates a more delightful customer experience, and provides insightful, measurable data to drive better business outcomes.

Link: <https://calendly.com>

Name: Doodle

What the company says: Doodle radically simplifies the process of scheduling events. This smart assistant saves time for millions of people worldwide, and in the end, it brings people together. Doodle is free and doesn't require registration by either the initiator or the participants of a meeting poll. Doodle also provides solutions for 1:1 scheduling and customer appointment scheduling. The world's leading online scheduling service, Doodle takes the pain out of finding the right date and time for a group of people to meet and makes scheduling virtually effortless.

Link: <https://doodle.com/en/>

Name: Setmore

What the company says: Setmore offers a free, online scheduling platform for you to connect with your customers. Manage all your appointments through one simple, sleek calendar system and give your business the freedom to grow.

Link: <https://www.setmore.com>

Name: SimplyBook

What the company says: SimplyBook.me is an outstanding online scheduling solution for small and medium-sized businesses of all types. We provide high-quality booking services for companies all over the world and help them to grow and prosper. Our reputable and secure appointment system is designed to make bookings easy and comfortable for both our users and their clients!

Link: <https://simplybook.me/en/>

Name: Square Appointments

What the company says: Square helps sellers more easily run and grow their businesses with its integrated ecosystem of commerce solutions. Square offers purpose-built software to run complex restaurant, retail, and professional services operations, versatile e-commerce tools, embedded financial services and banking products, buy now, pay later functionality through Afterpay, staff management and payroll capabilities, and much more – all of which work together to save sellers time and effort.

Link: <https://squareup.com/us/en/appointments>

Billing

Name: Ascend

What the company says: Ascend is the modern insurance payments platform that provides automated all-in-one financing, collections, and payables. Ascend helps distributors sell more by eliminating labor-intensive, expensive processes while providing customers with the great online checkout and financing experience they've come to expect. We built Ascend to help you make it easier for people to protect the things they care about. By simplifying and modernizing insurance's financial infrastructure, our APIs make it possible to finally offer your customers an automated, all-in-one online solution to financing, collections, and payables — and to save you from tedious, expensive operational overhead

Link: <https://www.useascend.com>

Name: ePayPolicy

What the company says: ePayPolicy provides an easy to use, end-to-end solution with integrations into leading agency management systems allowing agencies, MGAs / wholesale brokers and premium finance companies to get up and running with electronic payments in days, dramatically reduce the number of paper checks they process, while simplifying their accounting reconciliation with automated data entry.

Our goal is to service agents and help them provide the best experience for their insureds. Help agencies, brokers, MGAs, and premium finance companies speed up receivables, bind business faster, and deliver a seamless user experience. Built by insurance professionals for the insurance industry, ePayPolicy is on a mission to replace paper checks for all agency billing. By offering a convenient, secure solution for independent agencies, brokers, MGAs, and premium finance companies, ePayPolicy is transforming the way the independent insurance industry collects payments and sends funds.

Link: <https://epaypolicy.com>

Name: Red Planet Software

What the company says: Red Planet Software is the leading provider of complete payment solutions specializing in Buy Now Pay Later Software, Insurance Premium Finance Software and Professional Fee Finance Systems. We are universally trusted to provide customized and cost-effective end-to-end software and support services in the finance industry. Our solutions manage quotes and loans administration through to financial reporting with feature-rich processes, automated approvals, intermediary and customer portals, integrated billing and online payments.

Link: <https://www.redplanetsoftware.com/us/products/odyssey-premium-finance-software>

Call Center

Name: Bitrix24

What the company says: Bitrix24 provides a complete suite of social collaboration, communication and management tools for your team, including CRM, files sharing, project management, calendars, and more. Bitrix24 is available in cloud and on premise. Build a strong Contact Center with Bitrix24. This platform supports a fully-featured and mature telephony module and various social network integrations, as well as others communication channels integrations. Automations, canned replies, quality control and other must-have features of the best call center are in the kit.

Link: <https://www.bitrix24.com/uses/call-center-software.php>

Name: Cisco Webex

What the company says: Maximize agent productivity and improve customer satisfaction with Webex—a leading provider in cloud contact center software

Link: <https://www.webex.com/contact-center.html>

Name: Dialpad

What the company says: Dialpad is the global leader in AI communications for business, transforming how the world works together. Dialpad customers benefit from a TrueCaaS experience, truly unified business and customer communications, including a cloud business phone system, text and team messaging, video meetings and the world's most advanced AI contact center — all in one beautiful app. Engage more deeply with sentiment analysis, real-time transcriptions, and battle cards. Deploy new contact centers and agents around the world in minutes. Stay plugged into your contact center wherever you are and on whatever device.

Link: <https://www.dialpad.com/contact-center/>

Name: Five9

What the company says: Five9 is an industry-leading provider of cloud contact center solutions, bringing the power of cloud innovation to more than 2,000 customers worldwide and facilitating billions of customer engagements annually. The Five9 Intelligent Cloud Contact Center provides digital engagement, analytics, workflow automation, workforce optimization, and practical AI to help customers reimagine their customer experience. Designed to be reliable, secure, compliant, and scalable, the Five9 platform helps increase agent and supervisor productivity, connects the contact center to the business, and ultimately deliver tangible business results including increased revenue and enhanced customer trust and loyalty.

Link: <https://www.five9.com>

Name: GoToConnect

What the company says: GoTo's flexible-work software – including GoTo Connect, GoTo Resolve, Rescue, Central, and more – is built for small and midsize business IT departments, but powerful enough for the enterprise. GoTo software is designed to support end-users' unified communications & collaboration (UCC) and IT management & support needs. By building its secure, easy-to-use software, GoTo is committed to ensuring the time at work is well spent so that time outside of work is better spent.

Link: <https://www.goto.com/ucaas/contact-center>

Name: LiveAgent

What the company says: LiveAgent is a multi-channel customer service software, which helps companies deliver exceptional customer service through various support channels like Voice, Email, Live Chat, Facebook, Twitter and Contact Forms.

Link: <https://www.liveagent.com>

Name: NICECZone

What the company says: With NICE, it's never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud native customer experience platform, CZone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center – and beyond. NICE CZone helps contact centers around the world create profitable customer experiences through our powerful portfolio of cloud-based call center ACD, call routing, self-service IVR, and agent optimization solutions. Our software enables contact centers to operate more efficiently, increase the quality of every customer interaction, create new pathways to profit, and ensure ongoing customer-centric business improvement and growth.

Link: <https://get.niceincontact.com/call-center-software-quote>

Name: TalkDesk

What the company says: Talkdesk is a global cloud contact center leader for customer-obsessed companies. Our automation-first customer experience solutions optimize our customers' most critical customer service processes. Our speed of innovation, vertical expertise, and global footprint reflect our commitment to ensuring that businesses can deliver better experiences across any industry and through any channel, resulting in higher customer satisfaction and accelerated business outcomes. Talkdesk Financial Services Experience Cloud for Insurance unifies the customer journey across policy servicing, claims, and new business.

Link: <https://www.talkdesk.com/call-center-solutions/financial-services/experience-cloud-insurance/>

Name: Zendesk

What the company says: Zendesk voice is call center software that is embedded in the Zendesk [ticketing system](#) for a seamless customer experience. Our phone support software helps expanding teams resolve issues faster while simultaneously measuring and improving phone support operations. With Zendesk, your team will deliver better customer experience across channels.

Link: <https://www.zendesk.co.uk/service/voice/call-center-software/>

Name: Zoho Desk

What the company says: Zoho is the operating system for business—a single online platform capable of running an entire business. With apps in nearly every major business category, including sales, marketing, customer support, accounting and back office operations, and an array of productivity and collaboration tools, Zoho is one of the world's most prolific software companies.

Zoho Desk brings to you traditional customer service telephony that has been redesigned for the cloud. Hook your help desk up to a customer service phone number to receive calls right from Zoho Desk. You can then associate the calls with existing tickets or create new ones. Desk gives you all the advantages of traditional phone support, without the usual hangups.

Link: <https://www.zoho.com/desk/call-center-software.html>

Certificates

Name: CertFocus

What the company says: CertFocus is a fully domestic certificate of insurance tracking solution that is flexible, proven and scalable, delivering the industry's highest compliance levels of over 90%. Simple, easy and quick implementation lets our clients choose either our self-service or full-service model. Group reports and dashboards by region or function and aggregate into full corporate reporting. From account management and compliance dashboards to the most dynamic, easy to access, flexible, customizable and comprehensive self service reporting in the industry, CertFocus delivers powerful solutions to accommodate your every COI tracking and document management need.

Link: <http://www.certfocus.com>

Name: Certificate Hero

What the company says: Certificate Hero is a SaaS platform that assists insurance brokers and their clients in issuing certificates of insurance with greater accuracy and efficiency. It allows for 24/7 certificate management for both brokers and their insureds.

Link: <https://www.certificatehero.com>

Name: Docutrax

What the company says: Docutrax is a knowledge-based business service that identifies and reduces insurance-related third-party risk to a wide variety of industry verticals. Its professional compliance management service pairs innovative technology with subject-matter expertise to track certificates of insurance (COIs) and complex insurance-related documentation. Docutrax is offered as both a managed service or cloud-based technology offering.

Link: <https://docutrax.com>

Name: Ebix RCS

What the company says: Ebix, Inc., endeavors to provide on-demand software and e-commerce services to the insurance, financial services, travel, healthcare and e-learning industries. In the Insurance sector, Ebix's main focus is to develop and deploy a wide variety of insurance and reinsurance exchanges on an on-demand basis, while also, providing Software-as-a-Service ("SaaS") enterprise solutions in the area of CRM, front-end & back-end systems, outsourced administration and risk compliance services, around the world.

Link: <https://www.ebixrcs.com>

Name: Flatworld Solutions

What the company says: Our insurance back office experts are proficient in receiving, processing and issuing insurance certificates quickly, accurately, and for a reasonable price. At the same time, we ensure that the certificate of insurance is issued on forms approved by your insurance agency such as ACORD forms, ISO forms etc.

Link: <https://www.flatworldsolutions.com/insurance-bpo/certificate-of-insurance.php>

Name: myCOI

What the company says: Leading the industry for over a decade, myCOI offers a complete Certificate of Insurance software and service solution. myCOI transforms how companies manage risk, with next-generation technology and automated workflows backed by insurance experts. With myCOI companies can achieve insurance compliance and protect against costly claims.

Link: <https://mycoitracking.com/certificate-of-insurance-management/>

Name: PlusOne Solutions

What the company says: PlusOne Solutions has been an industry leader in the risk management field by specializing in compliance programs that meet the complex challenges of geographically dispersed contractors, vendors, and employee networks. PlusOne Solutions protects companies from possible financial, legal, and reputational risks associated with contractor and vendor relationships while creating safer work environments. Specializing in contractor and vendor networks, PlusOne Solutions understands the need to efficiently, quickly, and accurately process all your compliance documentation to ensure your contractors and vendors are compliant when providing services to your customers. Minimizing the disruption in operations due to compliance is critical to your business. We use specialized processors who understand COIs as well as an automated process to

ensure that certificates of insurance are received in a timely and accurate manner. Our unmatched solution ensures your contractor network is fully compliant with your certificate of insurance standards, freeing up valuable time and resources for your organization.

LinkedIn: <https://www.plusonesolutions.net/small-business-certificate-of-insurance-management/>

Name: SmartCompliance

What the company says: SmartCompliance has transformed Commercial and Residential Certificate of Insurance (COI) Management Processes, increasing Vendor Compliance in an efficient and digital way. This powerful software automates Certificate of Insurance and proof of insurance renewals tracking that helps companies ensure end-to-end compliance. Streamline and speed up the process avoiding manual data entry with the most effective and user-friendly software for COI processing.

Link: <https://smartcompliance.co>

CRM Solutions

Name: AgencyCubed

What the company says: AgentCubed provides lead management and CRM solutions specific to those in the insurance industry. It helps users automate workflows, manage the relationship and generate leads by skills-based routing. The solution is cloud-based and offers sales automation, customer service and support, quoting tools, calendars, web self-service, call center, field service, and knowledge management. It connects with lead providers and aggregators to provide updated information on potential clients. Lead management module integrates inside sales with field sales and lead distribution.

AgentCubed provides customer report builder feature that allows users to analyze hundreds of data points in multiple combinations to improve sales efforts. It also provides down-line analytics for tracking brokers, affiliates, regions and satellite offices. The activity dashboards provide a view of key performance metrics for all down-lines. Line-of-sight access can also be granted to down-line users so that those users only see the data that is relevant to their sub group.

Link: <https://agentcubed.com>

Name: AgencyZoom

What the company says: Designed to grow your book-of-business, AgencyZoom provides insurance agents with powerful sales analytics and customer engagement automation. AgencyZoom solutions help you manage leads with ease, oversee sales in real-time, and better track monthly goals. The robust automation will drive retention and give customers a fuller experience with personalized onboarding, check-ins, renewal reminders, and google reviews for every policy sold – all while keeping you laser-focused on sales.

Link: <https://www.agencyzoom.com>

Name: Better Agency

What the company says: Better Agency is an agency success platform that uses automation to help insurance agents sell more policies, retain more customers at renewal and handle the service and claims processes inside an agency.

Link: <https://betteragency.io>

Name: FreeAgent

What the company says: FreeAgent is a complete CRM platform and robust work management system. FreeAgent helps teams get everything in one place, work more collaboratively to get more done, and track and improve performance. Whether it's a deal, a project, a support ticket, or anything else, FreeAgent helps your team stay on task. FreeAgent automatically logs and organizes your team's emails, calls and meetings so you can remove tedious tasks from your to-do list. Designed for the new world of work, remote teams thrive with complete visibility into day-to-day activity, real-time collaboration, and powerful code-free customization. By eliminating time spent searching for information and reducing manual data entry, FreeAgent empowers leaders to optimize sales, marketing, customer success, project management, and more.

Name: Freshworks

What the company says: Freshworks Inc. makes business software people love to use. Purpose-built for IT, customer support, sales and marketing teams, our products empower the people who power business. Freshworks is fast to onboard, priced affordably, built to delight, yet powerful enough to deliver critical business outcomes.

Link: <https://www.freshworks.com/crm/industries/insurance/>

Name: Gen4Systems

What the company says: Gen4's agency management is your complete business solution. Servicing group and individual insurance brokers, Gen4 is out of the box ready for your team. At the end of the day it is about getting the job done. For that, your business system needs to be fast and easy to use. Come join other brokers and learn why Gen4 is the easiest to use system on the market.

Link: <https://www.gen4systems.com/insurance>

Name: HubSpot CRM

What the company says: HubSpot is a leading customer relationship management (CRM) platform that provides software and support to help companies grow better. The platform includes marketing, sales, service, operations, and website management products that start free and scale to meet our customers' needs at any stage of growth.

Link: <https://www.hubspot.com/crm/>

Name: InsuredMine

What the company says: InsuredMine is an all-in-one sales automation driven platform for agencies, brokers and aggregators offering metrics and analytics data visualizations, sales, marketing, phone payments, reviews, forms, eSignature and much more. Get the most out of customer relationships through proactive pipeline management, engagement, and communication.

Link: <https://www.insuredmine.com>

Name: Insureio

What the company says: Insureio provides quoting tools, financial calculators, custom sales presentation solutions, and marketing materials housed within a cloud-based customer relationship management (CRM) software system to insurance, planning, and investment advisors, agents, and firms nationwide.

Link: <https://insureio.com>

Name: Lucrativ

What the company says: Lucrativ is a multichannel customer relationship management platform suitable for businesses of all sizes. It offers pipeline management, gamification tools, an integrated dialer, SMS campaign management, workflow management, lead management and more. The solution can be accessed on desktop and mobile devices. Users can automate daily tasks and create custom-built business processes using Lucrativ's visual workflow design tool. Communication can be routed to specific members of a

sales team based on their availability or skillset. Leads can be automatically segmented based on the likelihood of a lead to convert. Sales teams can also use the mobile AI module to set meetings, respond to incoming messages, schedule calls and more with voice commands.

Link: <https://www.lucrativ.com>

Name: NetSuite CRM

What the company says: NetSuite's Customer Relationship Management (CRM) software is the only cloud solution that delivers a real-time, 360-degree view of your customers. NetSuite CRM provides a seamless flow of information across the entire customer life cycle— from lead all the way through opportunity, sales order, fulfillment, renewal, upsell, cross-sell, and support. In addition to offering traditional CRM capabilities, such as sales force automation, customer service management, and marketing automation, NetSuite CRM allows growing companies to manage quote creation and delivery, order management, commissions, multi-national sales forecasting, and integrated eCommerce capabilities. Likewise, NetSuite empowers service reps with real-time visibility into all past customer transactions and current orders, inventory, fulfillment, service, and payment status.

Link: <https://www.netsuite.com/portal/products/crm.shtml>

Name: Odoo

What the company says: Odoo CRM allows sales teams to easily keep track of their top leads and opportunities. Users can personalize their sales cycle, take control of their statistics/forecasts, and even create marketing campaign automation to increase their overall sales performance. With Odoo CRM, users can get more leads than ever before. They can also follow-up on phone calls and meetings. Sales teams are able to analyze the quality of their leads, make faster decisions, and save time by integrating emails from all contacts directly into this fully integrated application.

Link: <https://www.odoo.com/app/crm>

Name: Radius Bob

What the company says: Radius Bob (Bob stands for Book of Business) is a lead management and Customer Relationship Management (CRM) software tool designed specifically for the insurance industry.

Link: <https://www.radiusbob.com>

Name: Salesforce

What the company says: Salesforce is the global leader in Customer Relationship Management (CRM), bringing companies closer to their customers in the digital age. Salesforce enables companies of every size and industry to take advantage of powerful technologies—cloud, mobile, social, internet of things, artificial intelligence, voice and blockchain—to create a 360-degree view of their customers.

Link: <https://www.salesforce.com/ca/>

Name: VanillaSoft

What the company says: VanillaSoft gathers all the information about leading prospects and clients and puts them into action. It combines unique cadence automation with data management to help boost your sales operation. It offers queue-based routing that allows sales representatives to call the right lead at the correct moment. The engagement platform of VanillaSoft eradicates administrative activities and automates workflows for better practice of sales activities. VanillaSoft is preferred over traditional CRM software as it offers a level of innovation and productivity to the sales teams. With this software, users can monitor the performance of individual team members and assist in additional

lessons or training if required. It also features performance visibility that can analyze all call activities very easily and offer better trends for improving the sales process. Sales leaders can also measure the quality of lead channels to enhance the efforts of inbound marketing.

Link: <https://vanillasoft.com/solutions/industries/insurance>

Name: Zoho CRM

What the company says: Zoho is a comprehensive suite of award-winning online productivity, collaboration and business applications for businesses of all sizes. To date, Zoho has launched 28 different applications which include several online office applications such as Writer, Sheet, Show and Mail along with a host of business applications ranging from CRM to Projects, Invoice and Meeting. These applications are offered directly via Zoho.com or through hundreds of partners in the Zoho Alliance Partner Program.

Link: <https://www.zoho.com/crm/>

Name: Zendesk Sell

What the company says: The best customer experiences are built with Zendesk. Our customer service and engagement products are powerful and flexible, and scale to meet the needs of any business. Zendesk Sell (formerly Base) is sales force automation software to enhance productivity, processes, and pipeline visibility for sales teams.

Link: <https://www.zendesk.com/sell/>

Forms

Name: Jotform

What the company says: Jotform is a full-featured online form builder that makes it easy to create robust forms and collect important data. Trusted by over 15M users worldwide, Jotform is a gateway to gathering better information to power your business.

Link:

Name: Typeform

What the company says: Typeform is a no-code SaaS platform with thoughtfully-designed tools that help companies grow, thereby engaging with their audiences. We offer people-friendly forms, quizzes, surveys, and asynchronous video solutions—turning digital interactions into human connections. Typeform drives more than 500 million digital interactions per year and integrates with hundreds of other business-critical tools like HubSpot, Calendly, and Slack, to name a few.

Link: <https://try.typeform.com/home>

Referral Companies

Name: AskNicely

What the company says: AskNicely is the Frontline Success platform pioneer, connecting the dots between employee experience, customer experience, and revenue growth for service businesses. The industry-leading mobile technology platform delivers personalized coaching and motivation for frontline workers powered by real-time customer feedback and eliminates the need for layers of middle management. Measure every customer experience with real-time NPS. Connect real-time customer feedback with all your teams, systems and processes, based on the Net Promoter Score (NPS®) framework.

Link: <https://www.asknicely.com>

Name: Birdeye

What the company says: Birdeye is the #1 Customer Experience platform for enterprise and small businesses. Birdeye's all-in-one Experience Marketing platform provides multi-location businesses with the data and the tools to deliver great experiences at every step of the customer journey. Over 80,000 businesses in industries ranging from healthcare, retail, hospitality and automotive, among others, trust Birdeye to help manage the complete customer lifecycle, from acquisition to retention across multiple digital channels. Create custom referral and loyalty programs to turn your happiest customers into your newest stream of revenue. With custom referral campaigns, they'll sing praises about the experience you provide across multiple channels, creating powerful word of mouth that brings their friends, family, and colleagues to your business.

Link: <https://birdeye.com/insurance/>

Name: BlueJay Reviews

What the company says: BlueJay Reviews is dedicated to helping businesses increase revenue and build a solid reputation by turning reviews into revenue. Managing reviews can make a huge impact on revenue. We automate your review management making it simple to respond to reviews quickly, promote great reviews automatically, and turn your existing customers into a referral engine.

Link: <http://insurance.bluejayreviews.com>

Name: HelloReferrals

What the company says: HelloReferrals insurance agency referral software turns your clients and network into brand advocates that refer their friends and family. Insurance Agent referral software engages your clients with original content and puts your referral marketing program on auto-pilot.

Link: <https://helloreferrals.com/insurance-agency-referral-software/>

Name: NiceJob

What the company says: Turn your happiest customers into a powerful revenue stream. NiceJob is a reputation marketing platform designed to help businesses get the reputation they deserve. It's the easiest way to get more reviews, referrals, and sales. We believe that if you are really good at something, customers should know about you without the need for you to be a marketing expert. Referrals give your customers the ability to easily recommend your business to their friends and family.

Link: <https://start.nicejob.com/referrals>

Name: ReferralMe IQ

What the company says: The ReferMe IQ™ team came together with over 100 years of experience across multiple industries to solve the number one problem in business: How to Get Enough Customers. Traditional marketing has most agents spending time and money on converting total strangers into customers. Thus, referral and personal network business opportunities are missed. Our mission at ReferMe IQ™ is to help agents generate referrals with state-of-the-art marketing intelligence developed to quickly generate results with minimal time and expense.

Link: <https://www.refermeiq.com/industries/insurance-agents-version-2/>

Name: Referral Factory

What the company says: Referral Factory has built an incredibly easy to use referral marketing solution that is geared at helping you get more referred customers. Our solution allows you to 'build your own referral program in under 5 minutes' by giving you access to over 1000 pre-built referral program templates that you can use as your own OR you can build your own referral program from scratch. You don't need to install any tracking scripts on your website - so you can build your program without a developer.

Link: <https://referral-factory.com>

Name: Referral Rock

What the company says: Give your best fans an on-brand sharing experience. Design marketing programs that make your business easy to share with a couple clicks. Track and optimize the word of mouth you've been missing out on. No developers required.

Linked: <https://referralrock.com>

Name: Rocket Referrals

What the company says: Rocket Referrals is a leading insurance communications platform based in Des Moines, Iowa. Since 2013, Rocket Referrals has been providing insurance agents across the U.S. with innovative tools to gather and analyze NPS feedback, manage online reputation, collect reviews and testimonials, grow referrals, automate cross-selling, and manage communications spanning email, text messaging and direct mail.

Link: <https://www.rocketreferrals.com>

Name: Tremendous

What the company says: Tremendous is the best platform to supercharge and run referral programs at scale around the world. Use the Tremendous platform to build referral programs and instantly reward your recipients with gift cards, prepaid Visa® cards, cash, and more. We make it easy for businesses big or small to buy, track, and manage digital rewards at scale for their referral programs. Customers can send rewards individually and in bulk with the Tremendous platform, or automatically by integrating with our API.

Link: <https://www.tremendous.com/solutions>

Videoconferencing

Name: BlueJeans

What the company says: With specialized video applications to meet every business need, BlueJeans is driving market transformation around today's hybrid work environment and helping customers achieve a new level of consistency, regardless of which mode of work they've chosen.

Link: <https://www.bluejeans.com>

Name: Cisco Webex

What the company says: Webex Meetings offers secure, integrated audio, video, and content sharing from any device, anywhere. Intelligent features such as noise removal, Webex Assistant, with real-time translations and People Insights automate meeting tasks to help you work smarter.

Link: <https://www.webex.com>

Name: ClickMeeting

What the company says: ClickMeeting was developed by parent company GetResponse, a leading provider of practical, cost-effective software for businesses of any size. ClickMeeting uses Cloud technology to facilitate face-to-face online collaboration with participants worldwide.

Link: <https://clickmeeting.com>

Name: GoogleMeet

What the company says: Google Cloud accelerates organizations' ability to digitally transform their business with the best infrastructure, platform, industry solutions and expertise. We deliver enterprise-grade cloud solutions that leverage Google's cutting-edge technology to help companies operate more efficiently and adapt to changing needs, giving customers a foundation for the future.

Link: <https://meet.google.com/?pli=1>

Name: GoToMeeting

What the company says: GoTo's flexible-work software – including GoTo Connect, GoTo Resolve, Rescue, Central, and more – is built for small and midsize business IT departments, but powerful enough for the enterprise. GoTo software is designed to support end-users' unified communications & collaboration (UCC) and IT management & support needs. By building its secure, easy-to-use software, GoTo is committed to ensuring the time at work is well spent so that time outside of work is better spent.

Link: <https://www.goto.com/meeting>

Name: RingCentral

What the company says: RingCentral, Inc. is a leading provider of business cloud communications and contact center solutions based on its powerful Message Video Phone global platform. More flexible and cost-effective than legacy on-premises PBX and video conferencing systems, RingCentral empowers modern mobile and distributed workforces to communicate, collaborate, and connect via any mode, device, and device location. RingCentral offers three essential products in its portfolio, including RingCentral MVP, a Unified Communications as a Service (UCaaS) platform including team messaging, video meetings, and cloud phone system; RingCentral Video, the company's video meetings solution with team messaging that enables Smart Video Meetings; and RingCentral Cloud Contact Center solutions. RingCentral's open platform integrates with leading third-party business applications and allows customers to customize business workflows easily.

Link: <https://www.ringcentral.com>

Name: Zoom

What the company says: Zoom is a space where you can connect to others, share ideas, make plans, and build toward a future limited only by your imagination. Our frictionless communications platform is the only one that started with video as its foundation, and we have set the standard for innovation ever since. That is why we are an intuitive, scalable, and secure choice for large enterprises, small businesses, and individuals alike.

Link: <https://zoom.us>

Voicemail Messaging

Name: Avochato

What the company says: Avochato offers SOC2 and HIPAA compliant advanced messaging software for marketing, sales, support, and operations teams. The company was named a Gartner 2022 Cool Vendor and a G2Crowd Leader. The company is backed by leading institutional investors including Amity Ventures, Base Ventures, Burst Capital, Gaingels, and XSeed Capital.

Link: <https://www.avochato.com>

Name: Customer.io

What the company says: Customer.io is a messaging platform that allows marketers to take an idea and turn it into a powerful automated message campaign. The world never stops growing and changing, and neither should your data. Our powerful logic based tools help you capture every edge case and connect to the real people in your audience. Built for flexibility, designed for usability, and affordable for everyone.

Link: <https://customer.io>

Name: Iterable

What the company says: Iterable is a cross-channel platform that powers unified customer experiences and empowers marketers to create, optimize, and measure relevant interactions and experiences customers love. It provides a marketing automation platform designed to optimize and measure every customer interaction.

Link: <https://iterable.com>

Name: Messagizer

What the company says: Messagizer is a voice broadcasting service provider for businesses. Its broadcast services include ringless voicemail delivery, bulk SMS marketing, peer to peer texting, whatsapp marketing and robocalling. Companies can quickly start your campaign without any infrastructural setup and send ringless voicemail to thousands of audience with Press 1 live transfer option.

Link: <https://messagizer.com>

Name: Robotalker

What the company says: RoboTalker is a computerized call and message provider. They offer HIPAA medical calls, churches' religious, appointment reminders, political campaigns, property managers, university education, non-profits, small businesses, and avatar call centers.

Link: <https://robotalker.com>

Name: Slybroadcast

What the company says: Slybroadcast is the productivity tool that businesses and professionals use to send straight to voicemail audio messages to multiple phone numbers at once. Slybroadcast is used primarily by sales, marketing, customer service, nonprofit and executive leaders. The service is owned by MobileSphere, based in Boston, MA.

Link: <https://www.slybroadcast.com>

Name: TrueDialog

What the company says: Headquartered in Austin, TX and founded in 2008, TrueDialog has been innovating and delivering for our customers for more than a decade. We are a team of veteran messaging experts who have built what we believe is the premier messaging platform in the industry by carefully listening to our customers. Our technology is cloud-based, API-centric, and with an ISO 9001 database, direct carrier connections and 99.9% uptime, is secure and scalable to meet the needs of the largest enterprises.

Link: <https://www.truedialog.com>