

**INSURANCE SALES & RISK
MANAGEMENT SYSTEM**

As independent agents, we continue to fight for our share of the market. The need to increase production while maintaining strong profitability means that we must find new market opportunities, increase our close rates and cross sell to raise our average number of policies in force (PIF count). All while we attract top talent, manage risk and continue to delight our clients. AVYST meets all these challenges and more in a single solution.



Designed for the P&C independent insurance agency, AVYST provides your producers and CSRs with the ability to manage a referral through the application process and up to the point where the policy is bound.

Our automated sales workflow and notifications to referral partners allows your agency to become more productive and 'easier to do business with'.

AVYST provides a complete guided interview process using intelligent questions sets designed to be conversational in nature. Where appropriate, responses to questions prefill through third party integration and previously acquired information. The interview questions dynamically build based on the client's responses and required carrier supplements. This means a reduced number of touch points and a better client experience.

Robust quoting and proposal creation support the sales process to closure. Pipeline tracking and analytics provide visibility into pipeline status, producer and agency performance. AVYST delivers a single workflow streamlined to create a positive customer experience. If binding more business is important to you, AVYST is the solution.

Let's get started!

Built by agents for agents



3025 S. Parker Road
Suite 115
Aurora, CO 80014
877.204.0704 ph
www.avyst.com

info@avyst.com
@AVYSTit
@GO_AVYST



NetVU Member Preferred Product



INSURANCE
Simple. Easy. Done.

Your Insurance Sales &
Risk Management System



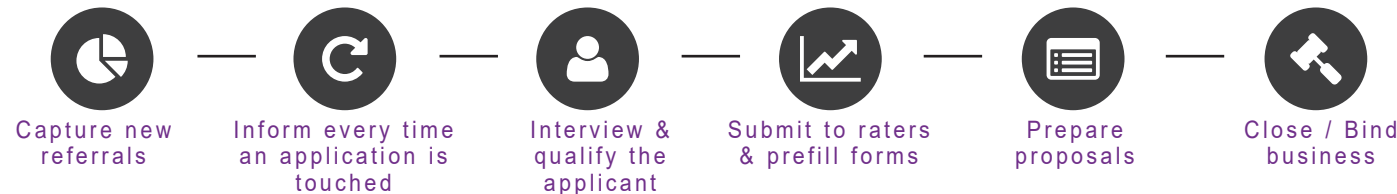
Agents making technology work for you

AGENCY COMPLEXITY

Your agency is most likely automated with the help of proven services and technology such as lead generation solutions, rating engines, agency management systems and so forth but it's not enough. Something is missing; just ask a CSR, producer or agency principal.

You experience numerous sources of productivity interruptions or drains; each is a potential contributor to client *dis-satisfaction* in the ordinary course of pursuing and closing business. There's seemingly no relief despite years of investing and deploying technology as well as having recruited and trained talented, dedicated employees.

There is a common refrain within most agencies frustrated at having to go to so many different information sources to effectively meet client expectations. The 'call for help' we hear you, is a consequence of the complexity inherent in most independent agencies.



THE PROBLEM

- An agency will work with numerous carriers, each with unique underwriting guidelines, billing plans, and systems causing confusion and leading to multiple client touch-points.
- Producers and CSRs use paper-based, tedious and repetitive processes to gather client information and input it into disparate systems, lengthening the time it takes to deliver a quote.
- Producers use several different applications or software products, often incompatible so routine tasks cannot be automated.
- An agency will rely on legacy processes which are usually poorly documented, and can only be learned the hard way; through experience, trial and error, under-fire and the transfer of 'tribal knowledge'..

INSURANCE MADE SIMPLE

As Independent P&C Agents, you strive to create a positive and consistent experience for your clients. In an industry as complex as ours, this can be difficult. Clients frequently turn to direct and captive insurance options in an attempt to simplify their experience. The result is limited choices that are often not the right coverage or fit. The challenge remains: how do we, as insurance and risk management advisors, reduce complexity while providing comprehensive and quality choices for our clients? AVYST, THE solution for managing the entire sales process and reducing risk.

INSURANCE SALES & RISK MANAGEMENT SYSTEM

AVYST will deliver a fully integrated, web-based solution enabling agents to efficiently track, process, quote and issue business. Additionally, new business, rewrites and renewals are conducted in a way that customers receive a consistent, high-quality experience. Employees become effective sooner and improve customer penetration. Designed by agents for agents, AVYST helps an agency operate smoothly and rapidly, dramatically reducing wasteful repetitive data entry, and eliminating excessive unnecessary touch points. AVYST is the path to increasing production, to more profits, and to confident clients. Everyone wins: clients, agency staff and carrier partners.

AVYST eFORMS WIZARD

The uniqueness of AVYST eForms Wizard is in the mapping and form fields. AVYST allows you to take a form and embed the fields with the intelligence of ACORD standard formatting and AVYST validation rules; the result is a smart form. Start with a new applicant or work with an existing client; search for the desired form or package of forms and add information just once to generate the application. Editing an application has never been easier because changes replicate throughout the entire application package. You can save and share applications with others. In your forms library, define favorites and frequently used packages to streamline your more complex quoting opportunities. Fast, light weight and easy to use, ensuring complete submissions every time!



AVYST SOLUTION

- Referral tracking
- Complete customer interview process
- One streamlined work-flow for all lines of business
- Intelligent question sets
- Quoting integration
- 3rd party integration
- Integrated forms
- Analytics



"The central challenge for independent personal lines agencies large or small is how to earn higher levels of client satisfaction externally while internally exceeding their goals for production as well as profitability." - Keith Savino, Warwick Resource Group



- Make Agents and CSRs productive in days, not months!
- Increase the number of policies per account.
- Confidently grow your agency.
- Create a consistent customer experience.
- Ensure complete submissions every time.
- Minimize multiple carrier complexity.
- Improve communication, faster response time and quoting accuracy.
- Increase client confidence with fewer touch-points.
- Gain peace of mind with a consistent workflow.
- Prepare ACORD forms more quickly and easily.

INSURANCE
Simple. Easy. Done.

A CALL FOR HELP

...from a CSR

"Every carrier has its own system...10 carriers means 10 systems, different logins, rules..."

"Why can't 'they' agree to one set of standards or approaches?"

"I want my client to be happy...I'm glad they can't see how confusing our work can be."

... from a Producer

"There are way too many times I have to call my clients back to get more questions answered."

"Isn't there a better way to eliminate some carriers early in the process so that I can concentrate on just the ones willing to write the policy my customer needs?"

"I'm so tied up in paperwork, that I can't take the time I should to investigate other opportunities with this client."

...from an Agency Principal

"I can't easily see who my best performers are...I want metrics."

"Nothing hurts us more than to lose a really high potential employee who's discouraged by the learning curve...we must help them succeed more quickly."

"We have to be first in submitting a quote to a carrier. Delays can kill it."

"We must demonstrate that we're in command of the factors that affect our E&O rates."