



QQCatalyst

powered by Vertafore



The insurance industry is constantly evolving. In a market changing as fast as ours, the agencies that thrive will be the ones that embrace new technology and use it to their customers' advantage.

However, every minute spent managing your technology is time spent away from your customers and business. Whether it's data entry, mass emailing, or form filling, manually repeating all of these tasks are costing your agency valuable time and money.

It's time you could be spending closing more deals, rounding existing accounts, and delivering your personal, differentiated customer experience — driving retention and profitability. However, most independent agents don't have the staff or resources to keep up with effectively servicing every customer and winning new prospects.



That's why you need an agency management system built with you in mind. QQCatalyst offers simplified client and policy management, built-in sales and marketing automation, and effective employee productivity tools enabling you to build strong customer relationships and manage your business more effectively.

Continue reading to see how QQCatalyst can benefit your independent agency:

Agency Intelligence

Generate new leads with easy email marketing.

- **Create automated email campaigns**
Stop spending valuable time on email campaigns and spend more time building relationships with your customers.
- **Customize email templates**
Choose from a number of email templates or create your own, add your logo, and tailor your messaging to your needs.
- **Gain insights on marketing efforts**
Monitor the success of your campaigns with real-time reporting and charts.

Salesroom

Grow your sales pipeline.

- **Identify new business**
Track trends, see where an opportunity is in the pipeline, and track performance over essential metrics.
- **Strengthen customer relationships**
Spend less time identifying prospects and more time building and nurturing relationships.
- **Capitalize on cross-sell opportunities**
Execute cross-selling opportunities with a complete overview of your sales operation in one central location.

Employee Productivity

Monitor employee productivity to increase efficiency.

- **Track employee activities**
Ensure employees are spending their time doing the activities that drive the most revenue.
- **Recognize leaders**
Quickly highlight top performers for each metric tracked such as policies added, premium written and hours logged.
- **Improve overall productivity**
Review trends and gain insight on how to improve your agency's productivity.

Client & Policy Management

Provide exceptional customer service and easily manage policies.

- **Manage all customer communication**
Interact with customers and prospects from your office or your mobile devices.
- **Empower your customers**
Provide customers with a comprehensive summary of all their current and future insurance policies.
- **Simplify your records**
Maintain pre-formatted professional templates that are automatically saved to the customer's record.

Customizable Dashboard

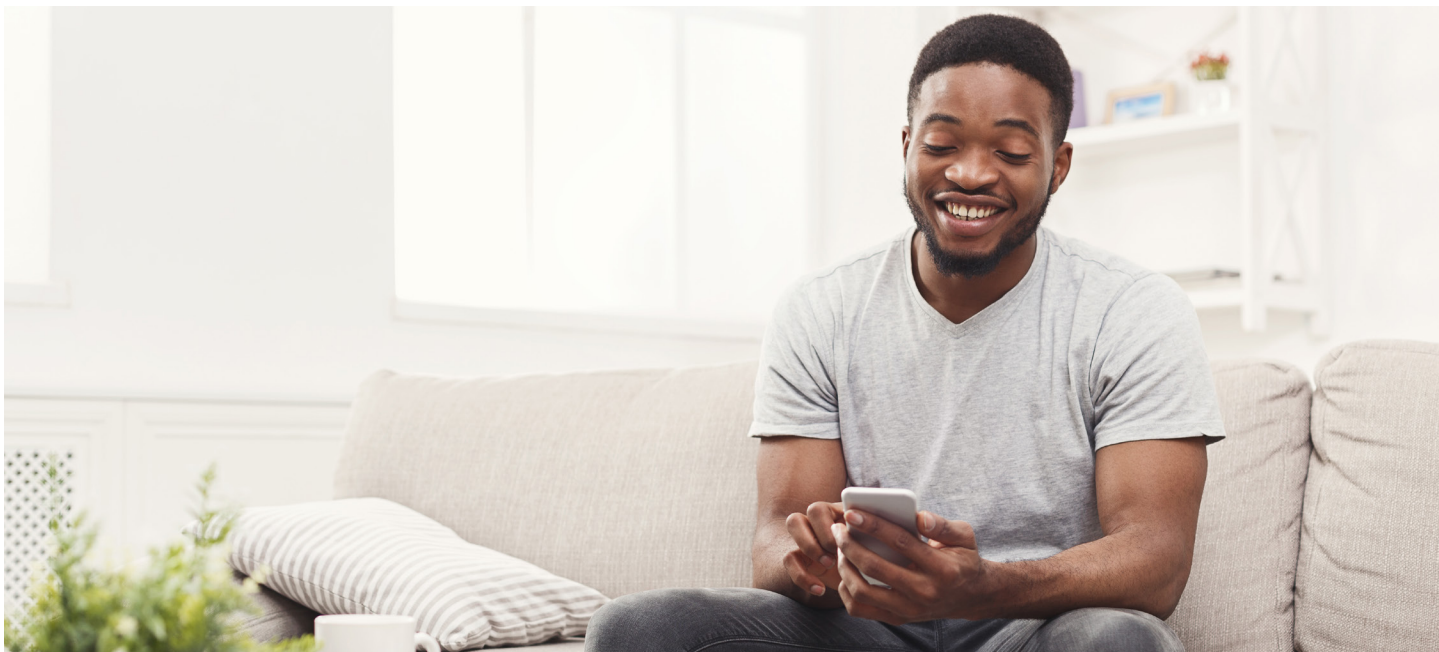
Gain critical insights in one glance.

- **See what matters most to you**
Create a customized dashboard and view the modules you care about most.
- **Quick-glance over your business**
Get a complete overview of your business and key information you need in one place.
- **Get your priorities in line**
Prioritize your work and identify which tasks require immediate attention.

Guided Workflows

Ensure every team member is on the same page.

- **Train your team efficiently**
Get new team members up to speed quickly with intuitive integrated training.
- **Create a standard procedure**
Assure every team member is completing standardized tasks in the same way every time.
- **Know what needs to be done**
Obtain step-by-step guidance with tasks like creating a policy, adding a contact, building a report and much more.



Texting

Conveniently connect with customers.

- **Send and receive texts with no hassle**
Text birthday wishes or payment reminders to any cell phone number and receive responses right within the system.
- **Keep track of communications**
Automatically attach inbound text messages to your customer's file for future reference.
- **Receive images via text**
Enable customers to send photos of incidents directly through text messaging making claims submissions easier.

Email Integration

Effortlessly send, receive, and store emails.

- **Simplify emailing**
Conduct all your email needs right within the system so you can stop jumping between programs.
- **Assign emails to contacts and policies**
Easily find all emails relevant to a specific customer without manually attaching or saving email messages.
- **Improve your delivery rate**
Successfully deliver more emails by never mistyping an email address again.

Digital File Management

Easily manage business-critical documents.

- **Import documents with ease**
Drag-and-drop images, PDF's, Word docs, and many other file types directly into system.
- **Simplify your filing process**
Automatically associate files with desired client, prospect, employee, carrier or even specific policy.
- **Take care of your information**
Keep your files secure and access them with ease.

Web-based Platform

Get work done anytime, anywhere.

- **Handle interruptions**
Open a tab to service a customer and then return to the previous tab without skipping a beat.
- **Support carrier downloads**
Process carrier downloads no matter where you are and access information on mobile devices.
- **Service your customers at their convenience**
Allow yourself to be on the move and service customers anytime, anywhere.

We at Vertafore recognize the challenges an independent agency faces day in and day out. Our size and stability in the industry enable us to help independent agents save time in their processes by simplifying and streamlining everyday tasks – allowing you to run an efficient agency and grow your book of business.

QQCatalyst gathers all the functionalities you need in one place and automates common business, marketing, and data management functions so you spend less time behind the computer and more time in front of your customers. Cut inefficiencies in your agency so you can grow your business and focus on the customer experience.

To learn more about QQCatalyst, call us at **800.444.4813** or visit **vertafore.com**



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