

If this email does not display properly, please view our [online version](#).
To ensure receipt of our email, please add netvu@informz.net to your address book.

December 2011



TransactNOW® Transforms Workflow

In these difficult times, businesses must find ways to do more with less. Streamlining workflow, especially between agencies and their carriers, is an essential step in achieving efficiencies and bringing productivity back to the bottom line.

Vertafore's connectivity tool, TransactNOW® is a powerful solution that connects agencies with insurance carrier databases in real time all from the convenience and security of your Vertafore agency management system. Sounds great, but what does it really mean in everyday situations?

At the NetVU Leadership Workshop, attendees shared their stories with others of how TransactNOW improved efficiencies in their agency. One such story comes from First MainStreet Insurance where the shifting landscape of their personal lines department required them to "become more creative in order to keep our heads above water," said Teri Cote, CISR, CPIW, personal lines account manager.

This all happened in the middle of staffing changes and cut backs, Teri explains. "We learned to rely heavily on TransactNOW for endorsements and policy/billing/claims look-ups. We didn't have a comparative rater at the time so keeping up with new business was next to impossible. Thankfully, we did learn how to quote through TransactNOW. What a Godsend!"

As a result of First MainStreet's better use of TransactNOW, the department managed to achieve its sales goals despite the environmental and economic challenges it was facing. "In addition," Teri said, "we reduced our paper storage and consumption by 20% in the last five months of the year. We were still working hard, but we were also working much smarter."

Even now, after migrating to AMS360 in March of this year, and implementing PL Rating this fall, First MainStreet still relies heavily on TransactNOW for its daily policy inquiries and endorsements. "We can complete an endorsement in both AMS360 and the company website in the same amount of time it used to take us to complete it in just one of those locations, all due to TransactNOW," Teri said.

Joyce Sigler, CISR, CPIW, CPIA, vice president and corporate secretary, Jones & Wenner Insurance Agency, finds great value in TransactNOW from the Real Time perspective. "Being able to transmit data to their carriers without duplicate steps is an enormous timesaver. We don't have to worry about multiple logins and logouts, and we're assured our data matches what's in our carriers' databases," Joyce explains.

Jones & Wenner has been using TransactNOW for about six years and they've set an internal goal to use it even more this year. "Our ability to make changes in Real Time, while the customer is on the phone or in my office has a huge positive impact on the customer's experience."

Joyce noted that not all carriers have embraced TransactNOW, many due to a misguided belief that it allows agents to move business too easily. Her response to that is just the opposite, and reminds carriers, "not all agencies sell on price, but they are always looking to place business with those companies that are easy to do business with. By implementing a TransactNOW workflow between you and your agency partners, you are demonstrating how convenient it is. You are also showing them you understand the challenges they face."

She has a recommendation for agents, too. "If you are currently using TransactNOW with just some of your carriers, your voice is strong and all your carriers need to hear about TransactNOW. It will strengthen your business relationship with your carriers, strengthen your service relationship with your customers, and most of all strengthen your bottom line."

Find out more about [TransactNOW](#) and how your fellow agents are leveraging its workflow benefits by joining the discussions on [NCOM](#). Also, don't forget to register for the [2012 NetVU Conference](#), April 26-28 in Anaheim, CA. There will be plenty of sessions on how to take the most advantage of TransactNOW and all the Vertafore line of products. For more resources, go to www.getrealttime.org. Remember - TransactNOW is free to Vertafore management systems users.



[NetVU](#) - 909 Lake Carolyn Parkway, Suite 1750 - Irving, TX 75039

(800) 456-7799 - [Questions/Comments](#) - www.netvu.org



If you would prefer not to receive any further e-mails from NetVU, please [click here](#).

