



Who We Are

AgencySmart, LLC is a result of years of research, planning and working with feedback from insurance professionals to develop a client management system specifically for the needs of insurance brokers.

Our goal is to help you manage your business so that it does not manage you. Unlike other solutions, we have developed our products exclusively for the insurance industry.

We know the issues at hand when it comes to managing an agency, our founders were benefits brokers. As brokers, they were forced to use multiple different software systems that did not connect to each other causing duplicate data entries and increased labor cost. We therefore created our software to eliminate redundancies while maximizing time. We venture to say that with the improved efficiencies it provides; the ability to eliminate multiple software programs and reduce overall labor costs, our products literally pay for themselves!

Product Description and Core Capabilities

AgencySmart is an “all-in-one” cloud-based solution designed for general agents and retail brokers who sell employee benefits, insurance products, financial services and other industry related products (payroll, HR and consulting) to the commercial and individual marketplace. From data management to on-boarding and benefit enrollment, AgencySmart solves the problem of using multiple systems to manage your business. AgencySmart saves time, reduces labor cost adds efficiencies that can make your agency more profitable.

Client Relationship Management System (CRM):

- Tracks and alerts you about client and prospect policy renewals
- Tracks service issues and alerts you when issues need immediate attention
- Tracks enrollment, termination and change processes
- Tracks dependents turning 26 or aging out
- Tracks employees and dependents turning 65 (Medicare eligible)
- Tracks and alerts you about to-dos and calendar events
- Complete audit tracking so you know who is working on what



Small Group and Individual Quoting System:

- Generate client ready presentations in less than 5 minutes and eliminate the building of spreadsheets
- Run single, dual or triple option presentations
- Create "composite" rates in member level rating areas
- Calculate employee contributions on a:
 - Percentage
 - Flat dollar amount
 - Defined contribution
- Small group medical and individual plans designs are built-in
- All SBCs and rate cards are attached

Comprehensive Commission System:

- Alerts you when clients have not paid commissions
- Post and pay commissions
- Build and track producer draws

Communication Writer (Email or Paper):

- Helps you cross-sell and stay compliant
- Send clients and prospects renewal and other reminders
- Send important information about plan changes
- Send notes/cards for birthdays, holidays and other important events

Comprehensive Built-in and Custom Reporting Capabilities:

- Matrix Report - Shows all the cross-sale opportunities that exist
- Performance Report - Shows how quickly your organization resolves service issues
- Book Of Business Report – Break down a producer's or agency's book of business by:
 - Carrier
 - Product
 - Group Size
 - Commission
 - General Agent
- Loss Ratio Report – Shows written vs terminated business
- Run a service history reports on a specific client or an entire book of business



MyBenefitLink (MBL) On-Boarding and Benefit Enrollment System:

With our built-in benefit administration system, you no longer need to package up all your client's data and send it to a third party system (and wait weeks if not months) for them to set up a platform. With MBL you can:

- On-board employees for Payroll and HR requirements
- Attach carrier and client documents in PDF, Excel, Word and other formats
- Enroll in benefits
- Create employee engagement polls and other surveys
- Use MBL to cross-sell business

Technical Details

Our company strives to provide its clients the highest level of performance and reliability. The following section outlines some important information about the technology behind AgencySmart.

Configuration

AgencySmart does not require any installation on the client computer. The program requires one of the major browsers (Google Chrome, Mozilla Firefox) updated to the latest version. AgencySmart is also accessible from tablet devices (iPads or Android tablets) as well as smartphones.

Software

AgencySmart is written in PHP, one of the most popular and fastest growing programming languages for the Internet. It is installed on the server running Linux operating system, Apache web server and MySQL database. The flexible design of the program allows for the quick alterations and additions to the software. To make your use of the program even more worry-free, should you encounter an error while using the program, our technical personnel are automatically notified about it.

Security

The software runs on a server, hosted at Amazon Web Services. This setup provides the highest level of security and reliability. The server running AgencySmart is protected by a firewall, which allows only secure traffic (SSL) to pass through. All information exchanged between the user and the server is encrypted using the latest technologies and verified by GoDaddy Certification. The server is configured to be HIPAA-compliant and all sensitive personal information (PHI) is always stored in an encrypted format.

Backup

AgencySmart runs backups every 24 hours (usually overnight). The system keeps these backups indefinitely.

Data Conversion

If you provide your data in any spreadsheet format (Excel, CSV, etc.) as a single spreadsheet, we will convert your data to AgencySmart free of charge. Conversion from other file formats will be charged on an individual basis, depending on the scope and complexity of the current database structure.