

# BEST'S REVIEW<sup>®</sup>

## ISSUES & ANSWERS:

# INSURANCE TECHNOLOGY 2010

Technology continues to reach new heights, and insurance companies are finding new and emerging technological solutions that are providing them with a competitive edge, improving operational efficiencies and producing substantial return on investments.



Interviewed Inside:



**Steven Finch**  
Vertafore



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# Intelligent Workflow

Steven Finch, vice president of Enterprise Market Solutions at Vertafore, says WorkSmart provides unprecedented insight, reduces process steps and ensures maximum efficiency through streamlined workload management. Excerpts from that interview follow.



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**STEVEN FINCH**

VICE PRESIDENT

“Our customers want to grow their business, increase their capacity and gain insight into their own workflows, which can mean rebalancing staff and revising and refining business processes. WorkSmart offers the ability to do all of that, and gives agencies what they need to thrive.”

**What WorkSmart is:** WorkSmart is Vertafore’s newest solution which provides agencies with intelligent workflow, business process reporting and content management. Simply put, it’s a workflow and content management solution that helps agencies increase their capacity and gain unprecedented insight into their business. Powered by Vertafore’s award-winning ImageRight product, WorkSmart offers much more than the typical workflow functionality found in agency management or document management systems. Because WorkSmart offers intelligent workflow capabilities, agencies can actually transform many of their long-standing existing business processes.

**How WorkSmart benefits agencies:** The goal of WorkSmart is to increase the capacity of the agency. WorkSmart provides visibility into an agency’s operations by not only showing work that has been completed but also work that is upcoming or in progress. This insight, a tight integration with agency management and content management systems and the intelligent workflows reduce the number of steps it takes to perform processes and ensures that the right people are doing the right work at the right time. Additionally, the solution’s intelligent workflow capabilities automate routine steps and processes, enabling agencies to increase their capacity and ensure that their customer-facing employees are spending more time servicing customers and selling business. By transferring tasks automatically to a processing pool or from one location to another, everyone in the agency is able to work to capacity, no matter where they are. So it allows agencies to grow without increasing staff.

**Why is WorkSmart so important to agents and brokers:** In today’s tough economic times, it’s important to increase an agency’s capacity with existing resources. Once the market recovers, agencies that take advantage of this technology and adopt this solution will be in a position to grow without increasing staff and be in a much better position for growth in the future.



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