



Vertafore™

Unleash your potential

Management Systems

AMS360



The Advantage Insurance Group team

“For an agency of our size **AMS360** is a great equalizer. It makes us more efficient so we have more time to spend building relationships.”

—Geoff Eaton, vice president of operations, Advantage Insurance Group, El Reno, Okla.

View the Advantage Insurance Group success story at vertafore.com/successstories.

AMS360

Unleash your business potential with AMS360

To build your business, your agency must be more efficient with the staff you have, generate more business opportunities and provide exceptional customer service.

Your increasingly mobile staff needs the flexibility to work in the office, at home or on the go. Your decision makers need a clear picture of your business and accounting operations to make the most of the book of business you already have, and to feed the pipeline so producers can bring in new clients and cross-sell to existing ones. You need an agency management system that can grow with you.

The AMS360® management system from Vertafore is the insurance industry's most advanced, cost-effective and proven system on the market. It delivers powerful tools that streamline workflow and improve productivity—helping you unleash the potential of your business. Built on the latest technology with intuitive workflows and carrier connectivity solutions, AMS360 is the system of choice for independent insurance agencies and brokerages of all sizes and all mixes of business.

AMS360

Business growth: Exceed your revenue forecasts

Of course growing your business is a top priority. In today's increasingly competitive environment you need a host of tools to not only meet your goals, but to exceed them. It can be easy to put off sales campaigns because your staff is focused on staying on top of their day-to-day activities. With AMS360 you can easily create and automate sales-producing activities.

Boost sales with targeted campaigns

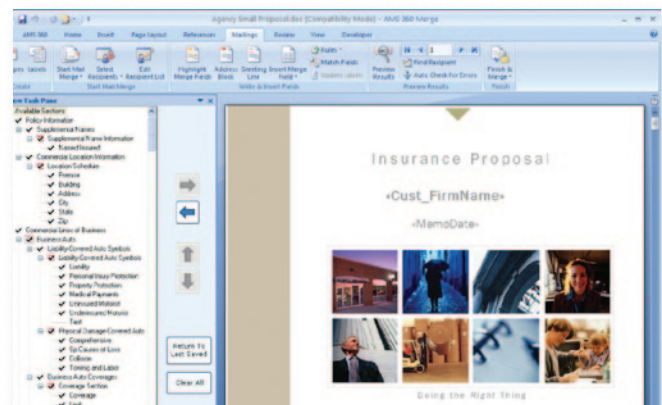
AMS360 contains powerful tools that take you through the process of creating successful campaigns, allowing you to both sell more into your existing book of business and acquire new customers. Create lists by line of business including commercial, personal and benefits—or by liability limits and deductible types. Import a prospect list and quickly create campaigns that will keep your producers focused on what they do best—selling.

Make policy renewal easier

Increase your renewal retention rate with specialized workflows that help you keep business. AMS360 electronically tracks all your renewals—no more working from a paper report. At a glance you'll see the current stage for each policy on the list—and be able to assign renewal policies to any user at any time in the process.

Simplify documents, proposals and schedules

In a competitive environment, you need to deliver information quickly and package it professionally. Unique to AMS360 is a Microsoft Word® add-in that makes it easy to produce polished documents quickly using your AMS360 data. This gives you the competitive edge that showcases your agency's capabilities.



Create polished proposals with ease.

With AMS360 automating your agency, you can:

- Manage customers, prospects and policies all in one intuitive interface
- Stay on top of finances with a complete insurance accounting system
- Access more than 750 built-in ACORD forms
- Grow your book of business with easy cross-sell and prospecting sales campaigns
- Quote, endorse and communicate with carriers in real time
- Choose the model that is right for your business—hosted or in-house

Productivity: Increase service without adding staff

As an independent insurance agent, personalized customer service is the cornerstone of your value proposition. Time spent manually entering data, looking up codes and working around inefficient workflows, is time better spent delivering the superior experience your clients expect. AMS360 takes your business to the next level by simplifying your most common processes so you can offer the best for your customers.

Provide great customer service by working smarter

Answer customer questions quickly and easily with state-of-the-art features such as the interactive dec page where all policy details are displayed in one view and changes and endorsements can be initiated instantly.

Seamless point-and-click integration with Microsoft Outlook® eliminates toggling between applications. Simply drag and drop e-mail messages into AMS360 instead of handling faxes or copying and pasting e-mails into your system. E-mail documents, pictures or files with one click from anywhere in the system. And it's all permanently documented within AMS360.

Interact with carriers with one click

Directly access carrier websites for billing and account information to process endorsements and to get quotes—all in real time. So there is no need to manage several passwords or spend time logging into carrier websites—AMS360 does the work for you.

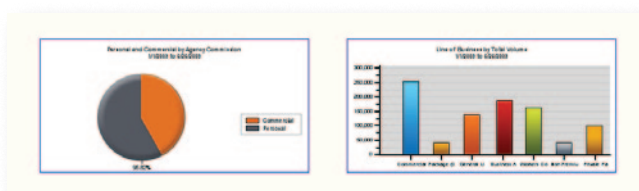
Save hours of data entry and reconciliation by scheduling personal lines, commercial lines and commission statement downloads from your carriers directly into AMS360.

Efficiently manage your documents

Don't waste time hunting for lost files or important attachments. AMS360 stores documents permanently and lets you instantly retrieve them. With advanced role-based security, you control access to all documents, ensuring that no unauthorized users view sensitive materials. The system even tracks each document's history: who viewed it, who updated it and who attached it to activities. These records are locked—protecting your agency from errors and omissions.

Control your finances

The AMS360 comprehensive cash or accrual-based insurance accounting system is unmatched in the industry. Manage multiple business units, divisions and branches and track multiple general ledgers with ease. AMS360 gives you full visibility into all financial aspects of your agency including invoicing, account currents, direct bill bookings, commission statements and more.



AMS360 graphs put key business metrics at your fingertips.

“I’m a total convert to AMS360. We’re far more efficient, sales are up, and we’re doing it all with less staff. I just love this system.”

—Don Taylor, president, Bennion Taylor Insurance, Murray, Utah

Read the Bennion Taylor Insurance success story at vertafore.com/successstories.

AMS360

Peace of mind: Rely on proven, flexible technology

With AMS360 you benefit from the peace of mind that comes with proven, industry-leading technology and the stability of the agency management system with the fastest growing user base in the industry.

Extend security and reliability with Microsoft technology

AMS360 is built on Microsoft .NET technology, using SQL database architecture. SQL Server 2008 provides the highest level of security and reliability for your business-critical applications. Because your IT staff and programmers can work with the Microsoft.NET framework they are already trained and familiar with, you save money.

Grow with confidence

As your business grows, you need a management system that grows with you. AMS360 effortlessly scales to support more than 15,000 users.

Maintain compliance

Vertafore is committed to supporting your security requirements. Not only is your data completely secure in the Vertafore data center, but the security features within AMS360 allow you to keep control within the walls of your agency. Your system administrator can establish and enforce complex password requirements, enabling you to comply with evolving state and federal regulations.

You can also restrict staff access to all or some records—even to the customer level. AMS360 stores all activities (including e-mails) so you have a complete and permanent record of staff transactions, helping you reduce errors and omissions exposure.

Access your system anytime, anywhere

Confidently manage tasks in the field with any Internet Explorer-enabled mobile device. AMS360 is the leading web-based management system that makes it easier to conduct business on the go. Close that deal without a trip back to the office for paperwork. You can also support virtual offices and remote workers—reducing facility expenses.

Maximize AMS360 for your agency

No two businesses are exactly alike. Because you may have unique needs for your agency management system, we offer custom programming to handle just about any request. Web Services are available for AMS360 so you can make client data available for self service on your agency website without manual updates. Save time by connecting AMS360 with other software applications for seamless data sharing.

Ready for AMS360?

Visit vertafore.com or call 800.444.4813 for a personalized analysis of how AMS360 can help you meet your business goals.



The Renaissance Group

“We’ve given our staff a tool to improve job performance and better service customers. You simply can’t put a dollar amount on significantly increased staff morale and customer satisfaction.”

—Janet Cochrane, COO, Renaissance Group, Boston, Mass.

View the Renaissance Group success story at vertafore.com/successstories.



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Vertafore is the leading provider of software, services and information to the insurance distribution channel, including independent agents, brokers, MGAs, carriers and reinsurers. Vertafore leverages a unique industry presence to deliver meaningful solutions—powerful technology, critical information and robust insights to help organizations effectively respond to business challenges and capture new opportunities. Vertafore solutions are helping more than 15,000 customers and 500,000 end users gain a competitive advantage to accelerate their business performance.

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