



Vertafore™

Unleash your potential

PL Rating

Start selling more personal lines policies in less time—and close sales with a single call.

PL Rating is a comprehensive and easy-to-use multi-carrier, real-time rating application that dramatically reduces hours spent visiting carrier websites. With limited hours in the day and limited resources you need to make the most of what you have. Time spent typing in customer data over and over is time your producers and CSRs can use to do what they do best—sell insurance.

Offer Choice to Your Customers

Leverage the greatest value you offer as an independent agent—choice. With PL Rating you can capitalize on the advantage you have over direct writers and captive agency companies.

In the same amount of time it takes your competitors to provide a single carrier quote, with PL Rating you can present multiple rate and coverage options to your client. And PL Rating enables you to provide your clients peace of mind by researching their options, enabling them to make a better, more educated buying decision.

Saving Time Means Boosting Your Bottom Line

Only PL Rating seamlessly incorporates information from multiple data providers, which is essential for streamlining the quoting process. Because this information is available during the initial interview, there's no need to wait to hear back from your prospects for required

information like VIN numbers. This makes “one call closes” a reality.

Free up your staff to optimize their time and be more productive with these PL Rating features:

- **Solutions at Quote** delivered by LexisNexis® provides integrated real-time driver and vehicle information at the point of quote, reducing quote times and improving data reliability.
- **Built in home valuation from Marshall & Swift/Boeckh:** No more going to a different system to get your information. Easily create integrated replacement cost valuations for homeowner's policies, complete with reports using the trusted resources from MSB®, all without ever leaving PL Rating.
- **Self-service, multi-carrier quotes on your agency website with Consumer Rate Quotes:** Accelerate your new business acquisition process, and gain a competitive edge by providing website visitors with multiple rate quotes from the carriers you represent—right from your website.

PL Rating can dramatically increase your personal lines sales and offer you more time to spend growing your business.

Our customers have reported the following:

- Saved 60 minutes per customer quote
 - Carl Schlotman III, president, CAI Insurance, Cincinnati, Ohio
- Increased personal lines business 50 percent in five months
 - Jack Neal, owner, Neal Truesdale Insurance, San Luis Obispo, Calif.
- Saved five full-time positions
 - Mike Foy, president, Foy Insurance Group, Exeter, N.H.

“Being able to quote an auto or home with several companies within 10–15 minutes over the phone gives an independent agency the tools they need to compete with the directs and captives out there.”

-Dawn R. Post, agent, Riley Insurance Agency, Brunswick, Maine

Turn Complexity into Convenience

Using PL Rating simplifies your quoting workflow so much that both new employees and seasoned veterans will never want to quote the old way again.

Simply enter prospect information into the PL Rating interview screens, select carriers and within minutes, PL Rating presents you with quotes directly from your carriers—in real-time. With our integrated third-party data connections, quote information is pre-filled, saving even more time.

Then you can place the business with just one click and without re-keying the data. PL Rating automatically transfers you to the carrier's website so you can bind and issue the policy.

Integration With Management Systems Equals Extra Efficiency

Remarketing your existing policies is a great way to provide superior service and improve client retention. With PL Rating you don't need to re-enter data that is already in your agency management system.

Certified integration with PL Rating and AMS360®, Sagitta®, InStar, AfW® and Prime is available today. Vertafore agency management system users also enjoy shared user credentials and passwords between

“Instead of repeatedly entering the same information in individual carriers' websites, PL Rating does the work... You select which companies you want to rate, click a button, and in about two to three minutes, you have 12 accurate personal lines quotes to present to the customer.”

— Carl Schlotman III, president, CAI Insurance, Cincinnati Ohio

PL Rating and TransactNOW™. You only need to maintain one set of credentials, which saves time and reduces frustration.

Not using a Vertafore agency management system? PL Rating offers approved integration with all major agency management systems on the market today.

Vertafore is Your Partner in Success

Currently available in 43 states with more than 70 carriers in real time, Vertafore continues to grow carrier inventory. From large national carriers to regional specialists we're committed to providing the carriers you need.

The dedicated Vertafore team will ensure your PL Rating system is set up the way you need and your users are trained so you can be successful.

Additionally, we check in with you and monitor your progress to ensure that you are getting the most out of your system. And, any time you experience an issue, dedicated customer support is standing by on a toll-free telephone line or if you prefer, one click away with our on-line chat.

Start Selling More Today

Call today to get a personalized demonstration of how PL Rating can help you spend less time entering data and more time winning new business.

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 17,000 customers and 500,000 end users gain a competitive advantage to accelerate their business performance.

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