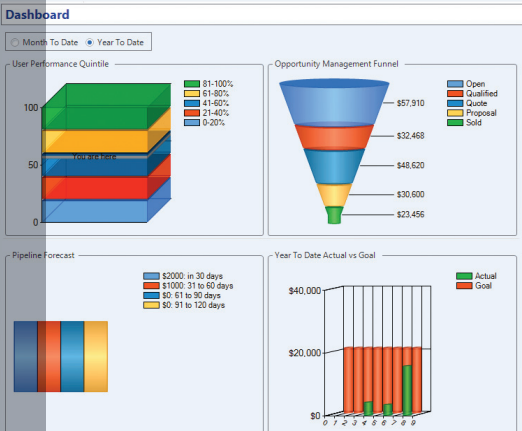




Vertafore™

Unleash your potential

# Vertafore® Pipeline Manager



**The first and only insurance-specific sales management platform, Pipeline Manager** transforms the way agencies sell—increasing sales overall.

Are you able to analyze your sales pipeline in real-time, and create an effective plan to meet your sales objectives? Pipeline Manager transforms the way agencies sell by giving producers a solution to easily manage leads, opportunities and X-dates, in a simple platform that is easy to implement.

## Forecast Accurately and Close More Business with Pipeline Manager

- Effectively forecast sales by producer, by line of business, or by location
- Predict trends throughout your sales pipeline to readjust resources and close more business
- Gain access to the data you need in three clicks or less
- Work efficiently using the easy to learn, intuitive interface

## Insurance-Specific Platform

The only insurance-specific sales automation platform available today, Pipeline Manager includes hundreds of lines of business, built specifically for the way producers sell. The tool requires no customization or special training—Pipeline Manager makes it easy for you to get started immediately.

- See data for hundreds of lines of business across all categories, allowing you to discover the full sales potential of each prospect
- Gain insight into close rates for specific lines of business

- Create a detailed sales road map for your producers
- Eliminate lost sales due to neglected leads
- Maximize sales revenue while increasing close ratios
- Speed up lead conversion
- Cross-sell across your client and prospect base
- Monitor sales activities in real-time from a single display
- Convert missed X-dates into new opportunities

## Easily Manage Leads, Opportunities and X-Dates

With simple, easy-to-use lead, contact and opportunity management tools, Pipeline Manager allows producers to focus their time actively selling to prospects.

- Develop consistent sales processes for all lines of business within your agency

## A Mobile Solution For Producers

Pipeline Manager provides mobile access to view contacts, opportunities and activities so producers can be productive, regardless of their location. Using their smartphones or tablets, your producers can call a contact or map an address with the tap of a finger. Mobile access to relevant data means your producers have more opportunities to be in the field, generating sales.

## Simple to Use, Easy to Implement

With built-in dashboards and reports, automated task workflows and a simple interface, agencies can rapidly deploy Pipeline Manager to capture maximum ROI.

- Rapidly on-board new producers with a simple, easy-to-learn interface
- Accelerate adoption by easily importing existing prospect lists
- Gain valuable insight with intuitive reporting that is available without extensive training or third-party consultants

## Increased Visibility and Accountability

With Pipeline Manager, you can see your sales activities and pipeline in a new and exciting way. With rich graphical content at your fingertips, it is easy to identify significant trends and create accurate forecasts.

- Gain insight into your agency's lead funnel, preventing lost opportunities
- Allocate budgets intelligently with lead source performance intelligence at your fingertips
- Transform sales processes using insight gained from powerful pipeline dashboards that show data by individual producer

**For more information about Pipeline Manager, contact a Vertafore Account Executive at 800.444.4813.**

- Plan more accurately by forecasting pipeline for potential revenue months in advance
- No technical installation process is involved - you can be up and running with Pipeline Manager in hours

Vertafore is the leading provider of software 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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