Book Roll

powered by Vertafore

Automate your processes, tighten end-to-end data security, and improve your agency relationships—all while focusing on growth insights with **Book Roll, powered by Vertafore.**

As a Carrier, you know conducting book rolls is a necessary growth strategy that can often be time-consuming, costly, and data entry heavy. Worse, it may risk the quality of your agency relationships.

It's possible to have a book roll process without the headache by implementing a technology that allows you to focus on analyzing data, not obtaining it. Plus, this technology upgrades the entire process for both you *and* your agency partners.
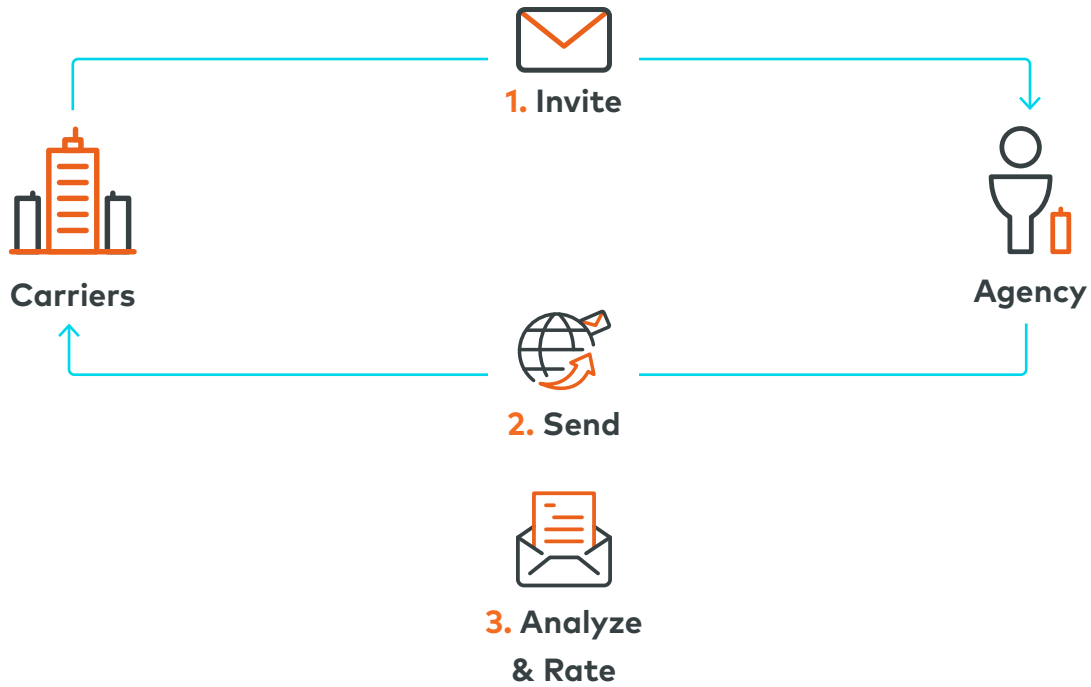
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Upgrade the process.

The book roll process most carriers and agents conduct can be difficult to rely on. It often takes more time and work than it should, with less data security and accuracy than it requires.

Vertafore's Book Roll solves this by simplifying the process into a few easy steps, allowing you and your agencies to spend more time on revenue-generating activities. No longer is travel necessary, no longer will you need to handle printed policies, and no longer will each data point have to be manually entered or sent. Cutting down the manual steps in your process allows your employees to focus on other tasks, and even helps your agency partners by not disrupting their day-to-day operations.

"Book Roll has increased our efficiency while reducing staff time —what used to require a team of 20 full-time staff, we now accomplish with 4 staff members."

Book Roll Customer

1. Invite

Carriers

Agency

2. Send

3. Analyze
& Rate

Data is King.

You conduct book rolls to assess and potentially acquire more of an agency's policy data that best fits your available markets. With Vertafore's Book Roll, the most important aspect of this process is getting as much data as possible to analyze. You need to be empowered to evaluate this policy data and be certain it is accurate. Because the book roll is conducted by extracting policy data directly from an agency's management system, the data you access is the most up-to-date and accurate version. Vertafore's Book Roll supports many different personal and commercial lines of business, as shown:

Lines Supported by Book Roll:

Personal Lines

- Auto
- Home
- Dwelling Fire
- Inland Marine
- Umbrella
- Watercraft
- Package

Commercial Lines

- Auto
- BOP
- GL
- Property
- Umbrella
- Workers' Comp
- Inland Marine
- Package

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Vertafore's Book Roll also focuses on data security. End-to-end encryption helps secure personally identifiable information against any potential cyberattack, which is security a traditional book roll with manual data entry cannot guarantee. By adhering to the highest cybersecurity standards, Vertafore's Book Roll helps protect you and your agency partners from costly hacks and data breaches.

Maximizing agency connections.

Vertafore's Book Roll provides a process that allows you to improve your relationship with agencies while still gaining the data you need. With Book Roll, you can digitally request a book of business without having to travel onsite or disrupt day-to-day agency operations. Whether you're focused on growing personal or commercial lines, Book Roll simplifies the process for everyone.

Focus on the insights.

When you use Vertafore's Book Roll, you will end up with a treasure trove of policy data to port, rate, and analyze.

You can also access reports on agency books of business and their policies, including:

- **Health of book:** A high-level summary of the book, including number of policies, vehicles, age ranges, etc.

- **Policy detail report:** A view of all policy detail in a book of business pulled from an agency's management system.

- **Book summary:** A representation of all books of business, as well as their current status.

- **Book policy:** A representation of all requested/received books of business, with a high-level list of policies and named insureds. This report also includes best rate and expiring premium with the batch rating option.

Book Roll integrates with **Vertafore's Rating API**, making it easy to compare your rates and coverages with the in-force policy. You can also take advantage of your own underwriting rules by sending data gathered through Book Roll to your rating systems, underwriting systems, and/or portal to decrease re-keying of data for your book roll team.

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Wrap it all up.

Vertafore's Book Roll is an end-to-end technology solution that improves and condenses the complicated book roll process. It turns a time-consuming activity into an efficient exchange that prioritizes data accuracy and security, while making it easy for agency partners to work with you. With Vertafore's Book Roll, you can focus on the growth insights and opportunities you'll find through clean data dashboards—which provide batch rating capabilities to enable quick and easy competitiveness assessments—as well as the ability to port data into your existing quoting and analytics systems.

Focus on growth, streamline your process, evaluate your competitiveness, and improve your agency relationships with Vertafore's Book Roll.

or call 800.444.4813

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