Small commercial workflow
before & with
Commercial Submissions

Before
Time consuming, manual, and slow

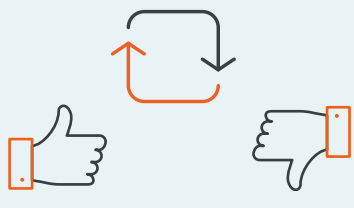**With**
Efficient and effective

Before

Data gathering
Servicer manually enters data, including re-entry of previous submissions. Data is gathered from and stored in documents
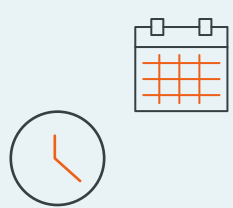
Initial submission
Then, the servicer re-enters data into multiple carrier sites, each with different questions

Collaboration / follow-up
Multiple hand-offs back and forth between carriers and agents

Receive quotes
Deals are lost while waiting for carrier responses, since clients have become frustrated by delays

Customer review
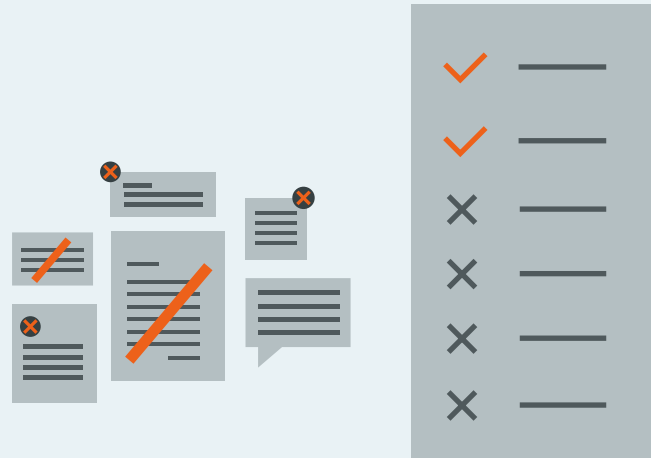Agency and client email documents back and forth, tracking changes

Bind and issue
Carrier binds the policy, but finds it difficult to identify attractive risks and communicate appetite with agent partners

Agency work time

4-5 Hours

With

Pre-fill & questions
AMS integration speeds up data gathering from client, servicer completes the rest

Quoting
Client information is accurate and complete - sent to multiple carriers at once

Receive quotes
Connected carriers return quotes in seconds

Bind and issue
Carrier binds and issues

Agency work time

<2 Hours

Potential Time Savings: Over 40%

Commercial Submissions automates and simplifies the small commercial quoting process — from application through quote and bind. Write more profitable commercial business—in less time— with real-time quotes from carrier partners.

Learn more

Vertafore