

Take advantage of the industry's leading independent agency management system and comparative rater by combining QQCatalyst® and PL Rating®.

This seamless integration provides operational, marketing, sales, and rating tools all in one platform to increase retention, new business, and cross-selling. Enable your agency to grow your book of business, improve your customer experience, and increase productivity.

Solution Benefits

- **Two-way integration:** Reduce duplicate data entry and mistakes with a seamless connection between your management system and rater for the following: • Full Name • DoB • Gender • Marital Status • SSN • Phone • Number • Street Address • City • State • Zip Code • County • Effective Date • Expiration Date • Line of Business • Coverages • Limits • Drivers • Vehicles • Policy Term
- **Streamlined rating data collection:** Consolidate redundant carrier questions, leverage templates, and utilize intuitive 3rd party data and workflows to prefill, enter, and finish quotes faster
- **Real-time rating:** Offer dozens of competitive quotes in less time than it takes to get one from a carrier website with over 300 real-time carrier connections.
- **Carrier partnerships:** Work with carrier partners that continuously develop and test their data and connection to deliver the smoothest quoting experience.
- **Sales focused AMS:** With Salesroom, identify new business, round out your current accounts, and strategically manage prospect sales cycles with the fully integrated sales pipeline manager.
- **Orange Partners:** Access Vertafore's tech hub with custom solutions including portals, mobile, e-payments, and multi-channel communications for a full management experience.
- **Incident prefill:** Save time quoting auto and avoid MVR chargebacks by auto populating driving history and court-based traffic violations.

Potential for:

Retention

PL Rating and QQCatalyst help you with proactive client contact and packaging home and auto, which can lead to 5% higher retention rate.

"QQCatalyst helps us retain customers by allowing us to identify problems before they occur."

John Wheeler,
Owner, The Wheeler Agency

Time saving

At least 50% reduction in auto quote time.

"PL Rating has saved our agency 5 full-time employees versus quoting directly on each carrier website."

Mike Foy,
Owner, Foy insurance

Revenue growth

Through proactive client contact, agents have seen 55% higher growth over those who are not actively contacting their customers.

"QQCatalyst saves me time, money, streamlines my processes, and helps me sell and service my clients more effectively."

Michelle Mosher,
Principal, Southshore Insurance

Simple and intuitive workflow

PL Rating to QQCatalyst

Streamline quoting, data collection, sales, and marketing processes by using integrated workflows.



1

Quote in PL Rating



2

Bridge data fields into QQCatalyst



3

Export data as either customer or prospect
(Prospects automatically populate in QQCatalyst's Salesroom)



4

Customers and prospects are placed in QQCatalyst's automated Smartflows where they begin receiving customized and well-timed automated communication

QQCatalyst to PL Rating

Designed for remarketing existing policies for a better rate or quoting changes to an existing policy.



1

Open the existing customer policy in QQCatalyst



2

Bridge data fields into PL Rating



3

Land on the client information screen in PL Rating



4

Make changes to quote
a. Remarket existing policies by choosing a different carrier(s)
b. Change vehicle or drivers and remarket with existing carrier and/or any other carriers



5

Quick remarket actions lead to increased retention and improved customer experience

Visit for more info

or call 800.444.4813