

Cloud Apps to Improve

# Agency Efficiency



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*Agency Management Systems*

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# Introduction: Cloud Apps— What Can They Do for You?

The cloud had its time as the wave of the future, but now the future is here. **Cloud based applications are the new norm**; allowing successful agencies to be more flexible in their workspace, offering greater data security and keeping up with ever increasing bandwidth needs. The cloud isn't limited to online data backups or document sharing either. More and more daily business operations are moving to cloud based systems.

This eGuide will focus on how cloud apps can **boost your agency's efficiency**. We'll also take a look at some of the most popular apps—giving insight into their capabilities so you can tell which best fit your agency's needs.

With so many apps out there, we need two eGuides to fit them all in, so stay tuned for Cloud Apps Part II, which will be published in the coming months.

# Benefits of Using Cloud Apps

## 1 Flexibility in workspace

- **Access what you need**, when and where you need it, using almost any device with an internet connection
- **Keep your workflow moving** by working at home or in the office without having to transfer files to and from different devices
- **Put inspiration to work** when it strikes without having to wait until you're back in the office

## 2 Innovation through communication

- **Share ideas** when you think of them to keep creativity flowing
- **Communicate with more than your voice:** cloud apps let you see visuals, too



*“Save money with predictable, monthly pricing that allows you to invest in what you need now and increase it as your needs and funds increase.”*

### **3 Data security and recovery**

- **Keep your documents secure** with frequent, automatic back-ups
- **Protect against data loss** from device theft or damage
- **Transfer data to new devices** quickly and easily

### **4 Staying ahead of the curve**

- **Stay up-to-date with frequent patches** so you don't have to worry about your technology getting stale
- **Increase bandwidth with ease** to save you from buying new devices as your agency grows
- **Save money** with predictable, monthly pricing that allows you to invest in what you need now and increase it as your needs and funds increase

# Apps for Your Daily Operations

If you tracked how often you opened your e-mail, calendar or a Word doc each day you might be surprised by how many hours you've spent in a week or month. These daily tasks can really add up, and making them easier to use can save your agency time and money. The right mix of cloud apps make it possible for these systems to work faster and work together to increase your agency's efficiency.





## Google Apps

**Google's apps** are the most widely used among businesses and extremely reliable since Google is constantly in the spotlight. Its biggest benefit is that it's free, but its biggest catch is its limited compatibility with non-Google products.

- ⊕ **Intuitive calendar** is customizable and easy to share with others
- ⊕ **Simultaneous doc sharing** with Google Drive allows for real-time editing with multiple users
- ⊕ **Best mobile access** for email and calendar
- ⊕ **Free to use** for an unlimited number of users, unless you want your own custom domain
- ⊖ **Limited capabilities for documents**, especially when it comes to Word formatting and Excel formulas
- ⊖ **Difficult to sync** with agency management systems





# Document Storage Apps

If you only use one cloud app, a document storage app should be the one. These apps help you keep your files backed-up and secure, and allow you to share the most up-to-date version easily among your employees. If you haven't invested in a good cloud based back-up system, now is the time. You should look for two types of document storage, one based in your agency management system and the other for docs that are in the works or aren't relevant to your management system.

## In Your Agency Management System

Doc storage in your agency management system is a must. Having documents such as client plans, recent e-mails and possible upsell opportunities attached to each client profile means you don't need to switch back and forth between programs or search in files to find what you need. This streamlines your agency, especially when it comes to customer service.

Keeping client info together also means great E & O compliance. Knowing that every detail of a client's history is documented in one place gives you piece



of mind, and you'll feel even more secure that it isn't tied to a single computer or file folder. By storing important agency documents in a cloud-based management system, you can be sure they are accessible anywhere with an internet connection and safe from technology failure or theft.

## Beyond Your Management System

Outside of your agency management system, you'll need document storage for the same reasons: data security and easy access to the most recent versions of your documents. As already mentioned, Google Drive is a doc storage option, but its limits on size make it less than ideal for long-term document storage.



**A great app for doc sharing is DropBox**, which offers free and paid options depending on your agency's needs. DropBox is easy to use: you simply install the application, then begin moving the files and folders you want backed-up to the DropBox folder. As you add files, they'll stay updated on your computer and within the DropBox cloud server.

You can share folders and files with others, allowing multiple people to open and edit items, and DropBox will let you know when and by whom the documents were edited. To keep from creating multiple versions of a doc, DropBox alerts you when trying to open a doc that someone else is editing. You can choose to create a new version or wait till the other person has completed their edits.

DropBox has been around for a while, so it uses the best security—the same 256-bit AES encryption used for online shopping and banking. Also, DropBox keeps a 30-day revision history of all your files, so you can go back to past versions if you decide against a change that was made.

With DropBox, you can get up to **16 GB of storage free**, and can move to plans ranging from \$9.99/mo up to \$795/year for 5 users, with additional user licenses available for a fee.

# Apps to Keep You in Touch

The best way to keep clients and gain new ones is to have a reputation for good customer service. And the best way to good customer service is great internal communication. Cloud apps can help you stay in touch with your team so your agency can serve client needs better and faster. **These apps allow you to communicate with multiple team members at one time through voice and video communication.**



## join.me

**What it is:** join.me is a screen-sharing app, allowing you to share your computer screen with up to ten others

**How it can help your agency:** This tool is great for teaching clients and employees how to use systems or walk them through troubleshooting. Each session can be recorded, making it a great tool for creating step-by-step tutorials.

**How it works:** Download the application and generate a security code for your participants. Have each person go to a secure, pre-generated Join.Me link and enter the security code created for your session and voilà! Everyone can see each step on your computer and, if desired, hear clear audio.

**Cost:** Ranges up to \$19/mo, depending on your agency's needs. See <https://join.me> for specifics.



# GoToMeeting

**What it is:** GoToMeeting is an app for virtual conference sessions. Up to 1,000 people can view each session and up to 6 can act as presenters.

**How it can help your agency:** Excellent for meetings and problem solving sessions when one or more of your team members aren't in the office. GoToMeeting can also be used with potential clients, making a long-distance presentation more impactful through its HD video and easy to share PowerPoint capabilities. Many businesses use GoToMeeting to host webinars on industry topics, which is a great way to gain new clients and market your agency as an industry leader. Like Join.Me, all sessions can be recorded so you can share them with a team member who missed a meeting or post webinars on your website.

**How it works:** GoToMeeting can be used on your desktop, laptop or tablet. After downloading, simply share a pre-generated toll free number and link with participants. If you have multiple presenters, you can easily switch from screen to screen with one click.

**Cost:** Ranges from \$19 to \$150/mo, depending on your agency's needs. Check out pricing specifics at <http://www.gotomeeting.com/online/meeting/pricing>



## Google Hangouts

**What it is:** Google Hangouts is a video conferencing service. Up to 10 people can live chat with each other using simultaneous audio and video.

**How it can help your agency:** When it comes to small group meetings or problem-solving sessions, Google Hangouts is one of the best for video quality. It's also compatible with almost every device imaginable, so you can join in on a meeting with your laptop, phone or tablet. The benefit of Hangouts is that you are able to see every participant's face at one time, so you can pick up on nonverbals and share visual aids as needed.

**How it works:** All you need for Google Hangouts is a Google ID, which is now available without needing to sign up for Gmail, Google's e-mail system. Once you have an ID, you navigate to [google.com/Hangouts](https://google.com/Hangouts) and install the app. You then set up a Hangout and easily email invites to your participants.

**Cost:** Free!



Hangouts

With so many cloud apps floating around out there, we'll need a part two to cover all you should consider for your agency. In our second part, we'll check out apps that help keep your email correspondence secure, keep you moving along with mobile, and help with (gulp!) marketing.

As you look in to how the cloud can benefit your agency, a great place to start is with your agency's management system. SIS offers a great cloud based system called Partner XE, which offers the basics of agency management plus functions suggested by agency professionals to make it a stand out. Along with its cloud capabilities, Partner XE allows you to integrate with Outlook, store and share documents, and integrate your finances all in one place.

*Note: products mentioned in the above article should not be considered product endorsements, just suggestions for where you can go to learn more.*

To find out more about Partner XE, contact us at **800.747.9273** or **sales@sisware.com** to talk about the ways Partner XE can work for your agency.

Partner 



## *About SIS*

Headquartered in Columbus, Ohio, Strategic Insurance Software (SIS) is the team behind Partner XE— an innovative web-based insurance agency management system that helps independent agencies streamline workflow and grow their business. Built on a foundation of strong technology and exceptional service, we're moving forward with a constant eye on innovation that will make independent agents' lives easier.

## *About Partner XE*

Supporting downloads from nearly 300 carriers, real time interaction, integrated agency accounting, and much more, Partner XE is a full-featured agency management system at an affordable cost for the independent insurance agency. For more information, please visit [www.sisware.com](http://www.sisware.com)

