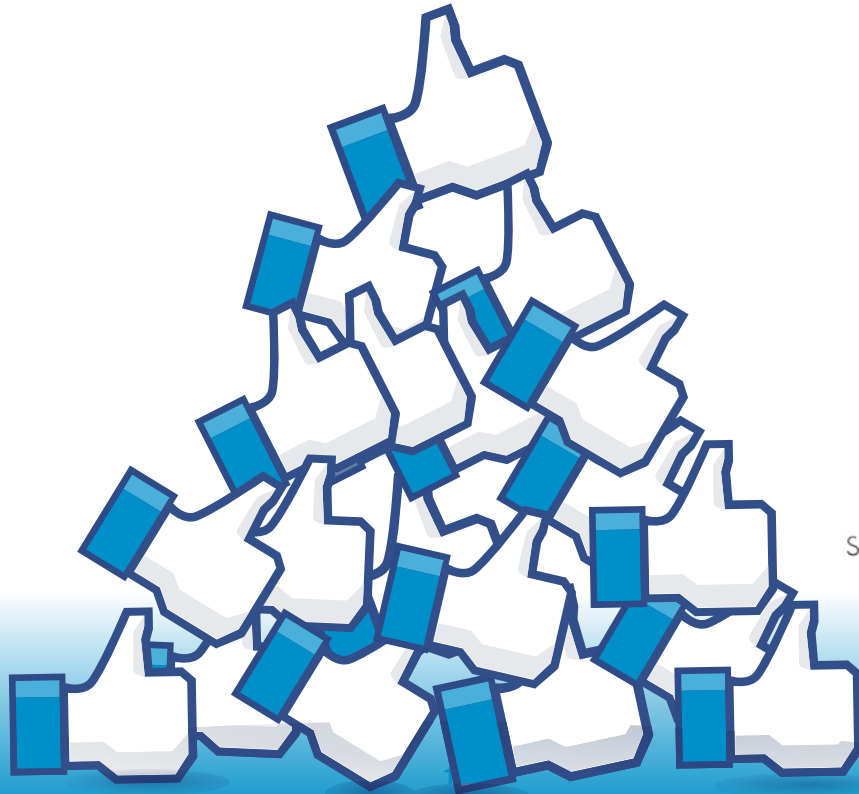


ADDING VALUE TO YOUR AGENCY with Commercial Lines Download



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Agency Management Systems

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Commercial lines policy details download (CLDL) is on the rise, and for good reason! Streamlined, consistent client records and data tend to put a smile on the faces of carriers, agency staff, and clients alike.

In this eGuide, you'll learn all the facts on CLDL and how to implement it in your agency.





Benefits of Commercial Lines Download (CLDL)

Commercial lines download brings great benefits to those you connect with in your agency:

Your Carriers love CLDL because it:

- ✔ Improves on the agency policy delivery process
- ✔ Saves time and money by cutting down on calls to carrier service centers
- ✔ Provides consistency to data entry

Your Staff benefits from CLDL because:

- ✔ Information moves faster and more efficiently
- ✔ Duplicate information is minimized
- ✔ Errors are reduced

Your Clients reap benefits of CLDL such as:

- ✔ Faster response times
- ✔ Consistent customer service communication
- ✔ Less paperwork

...And with all the increased efficiency, you will have more time to devote to “back burner” things like improving your website or streamlining other processes!

In addition to these many benefits, **CLDL also saves you money.**

Some agency management systems, like our Partner XE, already have the capabilities to allow for CL download, meaning you don't have to invest in a new system to make it work.





Recent Improvements

There have been significant advancements in commercial lines download over the past several years, making them an excellent asset for all agencies. Thanks to the [ACT \(Agents Council for Technology\)](#) workgroup, such improvements include:



Creation of guidelines, such as the [ACORD CLDL Implementation Guides](#), to give agencies tips on implementation and review best practices.



Increased data accuracy, through the implementation of detailed checklists, eliminating the common problems of the past.



Development of form documents that can be adapted for individual carriers/vendors to ensure data is sent successfully.



Implementation of agency, carrier, and vendor trainings to increase understanding across the industry.



Updated agency management systems that can accept information faster and easier.

Steps to Success



Before you jump right in to integrating commercial lines download, make sure your agency is ready. The following checklist will help you get started!

- 1 Make a plan**
Decide who needs to know what, and when, and then create a timeline for implementation.
- 2 Get your carriers certified**
Check with your agency management system provider to ensure the carriers you partner with are certified for download within their system (Check out Partner XE certified carriers [here](#)).
- 3 Talk with your carriers**
Ensure all your carriers are on board with the process and get in contact with their help desk to go over details.
- 4 Test carrier downloads**
Work with one carrier to test out the system. Be sure to choose one you have a good relationship with that has a large enough policy count to make an impact.
- 5 Stay in contact with your provider**

Contact with your agency management system provider is crucial to CLDL success.

Talk over the process with your provider and stay in touch during the implementation period to work out any issues that may evolve.

Get more details from ACORD's "Commercial Lines Policy Detail Download – Agency Start-Up Guide"



Partnering Right

Another important step in CLDL success is finding the right partners. If you are not in communication with your partners, you risk frustration and errors.

To avoid such issues, reach out to your partners and ensure they will support you in CLDL implementation and use. Important partnerships to note include your **carriers and agency management system provider**. For each partnership, you should address questions such as:

- ✔ What does the carrier/provider know about commercial line download?
- ✔ What do they see as their role in CLDL?
- ✔ How will downloads be sent?
- ✔ How will reports be created (on paper, electronically) and what will they look like?
- ✔ Who are the appropriate contact person(s) for each partner regarding CLDL assistance?
- ✔ Does the carrier/provider have guidelines in place for CLDL?
- ✔ How will errors be reported?
- ✔ How will errors be resolved?
- ✔ How will policy synchronization be addressed?

A great resource for you and your agency partners is the **ACORD Agency-Start Up Guide** for CLDL. As an ACORD partner, we at SIS fully support commercial lines download and ensure our clients have the tools they need for successful CLDL implementation within our Partner XE agency management system. We know the importance of clear, consistent communication with your agency management system provider and are always available to our clients at 800.747.7005 or sales@sisware.com.



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

Partner 

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