

5 Habits to Unleash the Power of Your Agency Management System Database

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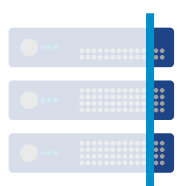
How a clean database and insurance CRM are all you need for sustained growth

The insurance industry is becoming increasingly competitive, and independent agencies are feeling the pressure to gain and retain business. Data and technology are the tools agencies need to stand out. With a quality management system database and insurance CRM, you can identify and target quality leads, serving your community for years to come.

The Data Problems Agencies Face

Relying on old management system data, chasing dead-end leads, and wasting time and money

90%



More than 90% of data is predicted to be incomplete, old, or duplicated each year¹

Chasing leads that don't fit the agency's ideal customer, losing out on valuable retention and referrals

68%



68% of new customers come from current customer referrals²

Replying to customer and prospect needs too slowly

50%



One survey found almost 50% of customers expected a response within four hours or less³

Missing opportunities to provide personalized service and outreach

88%



88% of insurance customers say they want more personalization from their agency⁴

The 5 Habits Your Agency Needs



1.

AUDIT

your data regularly, updating old information and removing duplicates

2.

SET UP SYSTEMS

for data entry, including defining which fields to use and who manages data entry

3.

HONE REPORTING

to make it easier to see patterns in customer behavior

4.

DEFINE YOUR IDEAL CUSTOMER

based on your reporting and target outreach to your ideal group

5.

INTEGRATE SYSTEMS

to decrease data duplication, improve data quantity, and automate data entry and reporting

Start putting these habits into practice with a modern, integrated agency management system and insurance CRM with robust reporting features: the Partner Platform Agency Management System Suite. Let one system and dedicated team bring your agency from catching up to getting ahead.

Get in touch at sales@sisware.com
or 800.747.7005, Option 6.

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Sources:
¹<https://findstack.com/crm-statistics/>
²<https://www.semrush.com/blog/customer-retention-stats/>
³<https://www.superoffice.com/blog/response-times/>
⁴<https://insuranceblog.accenture.com/customers-experience-demands-illustrate-the-importance-of-insurers-going-digital-now>