



Automate Your Agency with Ease

Benefits of an Agency
Management System

ease



A letter from Ease CEO and Co-Founder

When I was just getting started with my insurance agency in Minnesota, we didn't have the technology brokers do today. We didn't have Agency Management Systems (AMS). I remember we had to do everything the hard way, paper and pen — and Rolodex. At Ease, we're fortunate enough to have several quality partners not only in the AMS space, but in other impactful areas like payroll, telemedicine, TPAs, and so much more.

It's our mission to make your job easy. And some of that begins by considering the use of an AMS. To date, Ease is proud to have earned the opportunity to work with more than **85,000 small and mid-sized companies** that have more than **3.4 million employees** enrolling in benefits online through Ease.

Please use this as a resource to spur thinking about whether or not the use — and integration — of an AMS can help simplify your day-to-day operations.

— David Reid
Ease Co-Founder & CEO



Here to Stay: Agency Management Systems

Are you struggling with the organization of your agency and having difficulty finding ways to increase efficiency? It might be time to explore adding an **Agency Management System (AMS)** to your agency.

An AMS is a software as a service (SaaS) technology for insurance agencies to become better organized and operate more efficiently. This industry-specific customer relationship management (CRM) solution can work in niche markets within the insurance industry — think life, health, property, or casualty insurance. This technology helps organize and centralize information about prospects, clients, policies, agents, carriers, and commissions to keep everyone in your company aligned.

AMS vs. CRM

Most brokers rely on a CRM for things like sales calls, relationship management, email integration and marketing, documents, and more. So how does an AMS stack up? While CRMs used to be the gold standard, it quickly became apparent these were generic systems built to serve various industries. Agency Management Systems are built specifically for insurance-industry needs.

Why use an AMS?

Running an organized and efficient insurance agency is never a happy accident. Some of the most successful agencies will tell you their secret to improving their business operations and tracking their commissions is their AMS.

Manage your agency from anywhere with an AMS

Centralize your data and organize clients, prospects, groups, policies, agents, and carriers all in one place. Your AMS serves as a single source for information (including emails), which can be backed up to avoid the risk of losing information.

Improve documentation without having issues duplicating information or looking up previous documents. Now, the same customer information can be viewed by your entire organization.

Automate your workflows and spend less time on manual, tedious tasks and focus on winning new business or providing better service to your clients. An AMS will allow you to create automated workflows to do things like assign tasks to agents when a due date nears, send emails to clients when a renewal date is coming up, and send emails to prospects to stay in consideration.

Eliminate duplicate data entry, disparate data storage, and the time wasted right along with those. An agency management system is built to simplify and house data in a single place where everyone can view the same information.

Grow your book of business with an AMS by selling additional lines of coverage other than health insurance (property and casualty, auto, Medicare, Life, etc.); all of these lines can live within your AMS. Use this technology to get quotes, move a book of business, and identify other cross-selling or sales opportunities.

Track your lines of coverage in one centralized location. Your AMS can keep track of all the policies sold to individuals or groups. You also have visibility into where the policy is at within the application process. And you can see when various lines of coverage are up for renewal.

Improve your profitability and professionalism by freeing up your team's time and allowing them to focus on providing better service to your clients. With more operational efficiency comes more profitability.

How can an AMS make life easier for your agency?

While the features and benefits that come with an AMS are plenty, key differentiators help set an AMS apart from an ordinary CRM.

Meaningful insights at your fingertips

Integrate with a wide variety of third-party applications.

Communications are tracked within your AMS, and you can also create templates for commonly used customer letters to save you time from recreating frequently used communications.

Connect your data and view performance in real-time. See company information, plan details, group numbers, employee details, dependent details, and more. Utilize various reporting capabilities based on criteria you set.

Secure your data. Depending how the AMS is hosted, cloud-based data is backed up in real-time. This helps ensure the latest version of your data is safe and secure. Some AMS vendors house their data on-site, where backup is done manually and usually once per day.

Support remote workers thanks to an AMS. An increasing amount of the workforce is either working remotely or working from home. With an AMS, you can ensure your team has the ability to access the same information remotely as in the office.

Provide better customer service. Make excellent customer service one of your competitive advantages with help from an AMS. Every record within an AMS has a place to keep notes regardless of whether it's a prospect, client, agent, or policy. The ability to add attachments also helps make sure everyone has the latest information at their fingertips to make informed decisions. Anytime a client calls, you can look into their record and pick up the conversation where you left off.

Analyze your agency performance to make better decisions.

What if you could have even more confidence in your business decisions? Your AMS helps ensure you have access to the right data so decisions aren't based on guesswork.

Why use an AMS with Ease?

Gone are the days of dual data entry and searching for benefits data and client commissions in multiple places. Put benefits data and book-of-business data in one place and enjoy quick, accurate reporting without having to manually enter data from one system to another.

It's quick and easy to integrate an AMS with Ease. Look, we get it — it's no secret that you may need multiple pieces of technology to ensure your agency's success. And that's fine. But as a benefits administration system, Ease securely stores all of your groups' benefits data while your AMS is crucial for commissions tracking, agency-wide reporting, and more. By using one of Ease's AMS integrations, you don't need to manually input data in both Ease and your AMS to complete your reporting tasks. Quickly and accurately audit your commission checks without manually verifying each enrollment, understand where specific benefits are popular, and monitor your compensation by carrier, client, and product line.

In today's landscape, it's more important than ever before to be able to correctly audit your commission checks. Track commissions and make sure you're getting paid correctly while Ease automatically sends information, like monthly premiums, to your integrated AMS.

You want all of the technology you use to simply work well, and work together. And now it can. Activate an AMS integration within the Ease marketplace to enjoy one source of complete information for yourself and your team.



What data flows from Ease to my AMS?

The **four types of data** that flow directly from Ease to your AMS include group-level data, employee-level data, enrollment data, and plan data (policy number, group number, premium amount, plan start/end dates, waiting period, etc.).

Find the Best AMS for You



Ease and AgencyBloc partner to bring you a best-in-class enrollment system seamlessly integrated with a powerful agency management system. This integration allows you to sync data, such as companies/groups, individuals/group members, and policies/enrollments between Ease and AgencyBloc. This exchange of data will save time and make it easier to service prospects and clients. AgencyBloc is the #1 recommended agency management system for life and health insurance agencies.



How to Activate

To get started, visit **Marketplace > Agency Management System > AgencyBloc** in your Ease account.



The Ease and BenefitsGuide integration eliminates redundant data entry by easily loading all your groups into Ease using the data from within the BenefitsGuide: Insurance Agency Management System. Then, all the newly created or updated employees and their benefit elections automatically sync from Ease back to BenefitsGuide.



How to Activate

To get started, email support@benefitsguide.com to have the Ease integration installed into your BenefitsGuide org. Then enable BenefitsGuide in your Marketplace. The Marketplace Setup Wizard will walk you through the necessary steps to begin using the integration for each group.



The Ease and Benelinx integration enables brokers to fully manage sales, renewals, and enrollment in a secure digital environment. Brokers can expect a significantly shorter timeframe for building open enrollment windows through reduced data entry, fewer errors, and increased detail on plan design.



How to Activate

Enable Benelinx in the Ease Marketplace by going to **Marketplace > Agency Management System > Benelinx**.

NextAgency

Ease and NextAgency work together to help save you time, money, and clients by delivering a modern agency management system with powerful CRM workflow automation tools, while enabling you to give benefits management software to your clients. The Ease and NextAgency AMS integration supports individual/group health, life, medicare along with other products.



How to Activate

To get started, visit **Marketplace > Agency Management System > NextAgency** in your Ease account. NextAgency will then be in touch to continue the setup process.



Ease and Signal Sync Agency Engine™ have made it easy to create custom Benefit Books, WRAP Docs, POP Docs, and more. The Agency Engine connects and stores data for clients, prospects, carriers, helpdesk issues, and more.



How to Activate

To enable Signal Sync, first start at my.signal-sync.com/signup. Then, login and migrate to your Agency Settings on the left sidebar and select Connections. Finally, enter your Ease username and password.

The 5-Step Process to Activate an AMS in Ease

Integrating Ease with one of our AMS partners is a one way sync (meaning you're connecting Ease to the AMS). Here are the five simple steps to activate an integration that is about to make your life a whole lot easier.

- 1 Enable the AMS of your choosing in the Ease Marketplace.
- 2 Grab the API key from **My Agency > Settings > API Key**.
- 3 Go to the AMS you've selected and enter the Ease domain AND API Key.
- 4 Pick which fields you want to map from Ease to your AMS.
- 5 Data will flow from Ease to your Ease-integrated AMS every hour.



Because benefits matter.

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