Nexsure Insurance Platform
for Retail Agencies

Take Your Agency to the Next Level

The Nexsure Insurance Platform streamlines agency operations, enables superior customer service and relationship building, while delivering insight into the business. The platform allows retail agencies to:

Improve Staff Productivity

The platform includes Service Automation – automated communication that frees up staff to do more revenue generating tasks. Service Automation can automatically email, text, and even make phone calls, with branded templates. Examples would include an automatic "thank you" for new business, creating and emailing out Auto ID cards for new and renewal policies, following up on pending and posted cancellations, communication prior to each policy renewal as well as "Happy Birthday" greetings. Existing clients document significant increases in revenue per employee and policy retention rates that are directly attributed to Service Automation.

Streamline Lead Capture and Service Inquiries

The platform allows agencies to create lead forms for prospects and service request forms for clients, to request a quote and service on existing policies. These forms will work from the agencies' existing website. Lead forms will populate a "lead system" in the platform so agency staff does not need to re-enter data. Leads and service request forms can be routed to specific staff based on the form, demographics, etc. The platform allows for tracking of service request forms and lead forms to create real time analytics of leads and service requests coming into the agency.

Improve Customer Experience

Clients can log into a secure portal, branded to the agency that will link from the current agency website. The Client Portal is customizable and can display customer information, policy details, auto ID cards, certificates, secure documents, and links to secure service request forms. Option to allow clients to add a holder to an existing certificate where client can email, fax or print their own certificates. Our 24/7 Client Portal includes the option of a resource center to post announcements for clients.

Gain Insight into Their Client Base

Effort Quotient (EQ) Tracking is a powerful management tool to keep track of the actual workload of servicing an account compared to the revenue generated from a client. For years agency owners have often known there are accounts that are not generating enough revenue to offset the service work being done but had no way to truly quantify it. EQ gives an ongoing score to compare most profitable to least profitable, based on a weighted scoring system.

Support Marketing Programs

Pull targeted lists of suspects, prospect and/or clients from the Nexsure database. Searches can include "with or without" certain lines of business, policy stages, classifieds and more. Lists are created in the platform to upload to your third party email marketing program.

The Nexsure Insurance Platform also includes:

- Document Management that includes a universal scanner interface along with PDF conversion editing software, and secure unlimited document storage in user or departmental inboxes.

- Integration with an E-Signature program, to simply send and track e-signature documents.