

nexsure
insurance platform



for Retail Agencies

X Dimensional
Technologies

Take Your Agency to the Next Level

Critical to any agency's success today is delivering a positive experience that meets the needs of today's customers who demand instant access and service. At the same time, efficiency and cost are critical factors for every agency looking for the right agency management system to enable them to be competitive in today's digital, always-on world.

The Nexsure Insurance Platform enables you to streamline operations, deliver superior customer service, build relationships, and gain insight into the business.



Existing clients see significant increases in revenue per employee and policy retention rates that are directly attributed to the platform.



Improve Staff Productivity

The platform includes automated communications that free up staff to do more revenue-generating tasks. With the Nexsure Insurance Platform, you can automatically text and make phone calls, and send e-mail messages using 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, and communication before each policy renewal.

Existing clients see significant increases in revenue per employee and policy retention rates that are directly attributed to service automation from Nexsure.

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 agency's 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 teams based on the form, demographics, etc. The platform enables tracking 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. The portal allows clients to add a holder to an existing certificate and email, fax, or print their own certificates. Our 24/7 Client Portal includes the option to post announcements for clients.

Gain Insight Into Your Business

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.

A modern insurance platform to manage and grow your business.

- ✓ SUPPORT MARKETING PROGRAMS
- ✓ E-SIGNATURE INTEGRATIONS
- ✓ DOCUMENT MANAGEMENT
- ✓ CONNECT WITH PARTNERS
- ✓ APIs AND INTEGRATIONS
- ✓ ENHANCED SECURITY

ABOUT US

XDimensional Technologies develops and markets the Nexsure Insurance Platform, a comprehensive insurance processing and distribution solution that is unique in its ability to empower and connect all players in insurance distribution. The platform drives efficient insurance processing, superior customer service, and insightful business management.

For more about XDTI go to www.xdti.com

