



TechCanary Agency Management System

Gain Competitive Advantage with an Analytics-driven Insurance Business

Run Your Business Your Way

The TechCanary Agency Management System (TC-AMS) is a cloud-based, configurable and interconnected insurance agency and brokerage management system built natively in Salesforce. It adapts to your business processes, so you can run your agency, brokerage, carrier, MGA or wholesale business your way. With rich, real-time analytics, TC-AMS creates an analytics-driven business so you can operate at maximum efficiency and profitability across all lines of business:

- **Manages the entire insurance sales and service process** from lead to sale to customer support and renewal for all lines of business: Property and Casualty, Life, Annuity and Employee Benefits in a single environment
- **Supports the ACORD® and CSIO Data Models** for interoperability and data exchange with other systems
- **Provides the complete ACORD form library** and integrates policy and quote data with form generation
- **Integrates with Salesforce email, phone, text, and social** communications
- **Supports Salesforce workflow** capabilities and provides dozens of pre-built workflows out-of-the-box
- **Supports IVANS, Ebix TEAM-UP and carrier-specific downloads** — certified by every major carrier

Let Data Drive Your Business

With TC-AMS, you can create automated workflows and processes that are triggered by any field in Salesforce.

- **Automate commission reconciliation** by policy — projected vs. actual
- **Manage commission details** including estimates, transactions and statements on a house, producer or external producer level
- **Stay on top of sales and customer retention** trends with real-time dashboards
- **Take action** with personalized and scheduled reports with today's data

Industry-leading Reports and Analytics

TC-AMS gives you access to deep reporting details for any and every type of data in the system including custom built fields and features. You can gain insights you never could before and access them from any device — anywhere, anytime.

- **Stay informed** with dozens of out-of-the-box reports you can't get anywhere else
- **Consolidate data** from every operation into one dashboard
- **Visualize data** the way you want — tables, pie charts, line charts, bar charts...

TechCanary Innovates on Salesforce

Built on the #1 CRM, Salesforce, TC-AMS integrates with all Salesforce features and the 1,000s of apps available on the Salesforce AppExchange for easy extension.

1st to implement complete ACORD® and CSIO data models inside Salesforce

1st to build a comprehensive Agency Management System inside Salesforce

1st to automate carrier downloads natively within Salesforce

1st to combine a leading CRM and AMS



Put Customer Experience First

With TC-AMS you can communicate with customers in any way they want — email, chat, social, or phone and arm agents with the information they need to succeed.

- **Provide sales and service a 360° customer view** for personalized service
- **Automate customer email reminders** for required documents, renewals and other key processes
- **Automate customer service processes** and communications for more responsiveness
- **Know your high-value customers** or agencies so you can prioritize them
- **Put customer documents at everyone's fingertips** with built-in document management

Maximize Agent Productivity

Optimizing agent productivity is critical for a successful insurance business. TC-AMS makes routine tasks easy and automates them wherever possible.

- **Create and manage quotes** and carrier submissions
- **Automate processes** associated with policy quotes, sales, service, and renewals
- **Create and manage policy certificates** and certificate holder details and requests
- **Automatically download** policy, claims, and commission data from every major carrier
- **Automate** alerts, task reminders, emails, call logs and dozens of workflows
- **Pre-fill ACORD®** and CSIO forms

The screenshot displays the Salesforce-style interface of the TechCanary Agency Management System (TC-AMS). At the top, there is a search bar and a navigation menu with options like Home, Accounts, Contacts, Insurance Quotes, Policies, Carriers, Producers/CSRs, Reports, and Dashboards. The main content area is titled 'Policy Richard Smith - Personal Auto' and includes buttons for '+ Follow', 'Edit', 'Delete', and 'Clone'. Below this, there are several tabs: DETAILS, RELATED, DOCUMENTS, ACORD, ACCOUNTING, HISTORY, ACTIVITY, and CHATTER. The 'DETAILS' tab is selected, showing a list of fields and their values, such as Policy Name (Richard Smith - Personal Auto), Policy Status (Active), Policy Number (211193620-3), Effective Date (8/1/2017), Renewal Date (8/1/2018), Policy Term (12 Month), Original Inception Date (8/1/2016), and New Business (checkbox). The 'ACTIVITY' tab shows a timeline of tasks, including 'UW Request - Photos Vehicle #2' (Oct 26) and 'Request - Add Vehicle' (Oct 15). The 'CHATTER' tab is also visible, showing a list of messages.

About TechCanary

The TechCanary mission is to provide the insurance industry a new and innovative alternative to legacy agency management systems and generic CRM and call center solutions — and be the first to provide an enterprise-wide, consolidated view of customers. TechCanary, a leading InsurTech company, is always thinking ahead, anticipating the unanticipated, and innovating. We exist to make our customers successful through our technology.



TechCanary

500 West Silver Spring Drive
Suite K320
Milwaukee, WI 53217
☎ (414) 446-3999
✉ Info@techcanary.com