**TechCanary**

# Innovative Technology Solutions for the Insurance Industry

## TechCanary Helps You Compete

TechCanary provides cloud-based insurance solutions for agencies, brokerages, carriers, MGAs, MGUs and wholesalers who want to gain competitive advantage by running their insurance business their own way, and not as traditional insurance software dictates.

TechCanary's Insurance solutions manage the entire insurance sales and service process in a single environment for all lines of business including Property and Casualty, Life, Annuity and Employee Benefits.

## #1 Source for Insurance Solutions on Salesforce

All TechCanary products are built natively on the Salesforce platform™ using Salesforce components and best practices. As a result, TechCanary products and solutions are:

- Compatible with Salesforce Sales, Service, Financial Services, Marketing, and Analytics Clouds
- Lightning Ready
- Salesforce Mobile1 Ready
- Available on AppExchange
- Compatible with Lightning Bolt Solutions / Community Cloud portals
- Industry-leading when it comes to reporting and analytics

## TechCanary Knows Insurance

TechCanary was founded and is led by executives with deep insurance and financial services domain expertise. Several have run their own agencies and TechCanary was born from one insurance professional's dissatisfaction with available agency management and business automation offerings.

## TechCanary is Committed to Insurance Standards

TechCanary is a member of the ACORD® and CSIO standards organizations, and participates in working groups.

- Member of ACORD®
- Member of CSIO
- Has built the most complete insurance data model implementation on the market

## TechCanary Innovates

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 is always thinking ahead, anticipating the unanticipated, and innovating.

- First to implement complete ACORD® and CSIO data models inside Salesforce
- First to build a comprehensive Agency Management System inside Salesforce
- First to automate carrier downloads natively within Salesforce
- First to combine a leading Customer Relationship Management and Agency Management System

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# Products and Services

## TechCanary Agency Management System

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
- Leverages data to drive your business
- Industry-leading reports and analytics
- Puts customer experience first
- Maximizes agent productivity

## TechCanary Insurance Standard

The TechCanary Insurance Standard (TC-IS) implements the complete ACORD® and CSIO standard data models inside Salesforce. It provides a foundation for you to configure Salesforce to support your unique way of doing business and still confidently interoperate with your back-end systems and those of your partners.

- Fast time-to-value
- Low total-cost-of-ownership
- Unparalleled policy detail and depth
- Interoperability and data exchange
- Real-time policy and customer analytics
- Customer-centric view of your business

## TechCanary Insurance Community Portal

The TechCanary Insurance Community Portal (TC-ICP) is a self-service insurance customer portal for agencies, brokers, MGA's, wholesalers and carriers. Built on the Salesforce Lightning Bolt framework for deploying next generation communities and portals, the TechCanary Community Portal provides a faster time-to-value to enhance your customers' experience with a self-service portal out-of-the box. Business logic and workflows are built-in. And of course, TC-ICP seamlessly integrates with Salesforce and the TechCanary Agency Management System.

- Enhances your customers' experience
- Empowers your customers

## CanaryServices

CanaryServices specializes in TechCanary and Salesforce implementations for the insurance industry. CanaryServices offers packages from setup, data migration, deployment, configuration, to ongoing support. We can provide a turnkey solution or work alongside your internal staff. CanaryServices offers:

- Implementation and configuration of TechCanary and Salesforce to a company's unique processes and procedures
- Data migration services to successfully map and move data from legacy insurance software to TechCanary and Salesforce

**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.

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