THE ANDERSON @gency Report

Best Technologies & Best Practices for Superior Results

First Look—Aspire Agency Management System

By Pat Alexander

Several weeks ago, I was privileged to be invited by the Impowersoft team to be the first person in the insurance industry (outside of testing agencies) to have a look at their new agency management software, Aspire. Since that visit, the Impowersoft team introduced their product to the industry at the Independent Insurance Agents & Brokers of America conference in Washington, D.C. Individuals I know who visited the Impowersoft booth have had very positive feedback about Aspire. Each person has communicated that they are as impressed as I am with what Impowersoft has shown us so far.

Background

Aspire was developed under the careful direction of CEO Safeer Hassan, who has been in the insurance industry, both on the agency and carrier levels, for over a decade. Safeer tells me that he was driven to develop a system after using a number of other agency management systems. He said that none of the systems functioned in a way that he found efficient or intuitive.

Two years ago he pulled together a group to begin working on developing Aspire. His vision was to create the most robust system in the insurance marketplace which would automate many processes and provide a system for the future. His goal is to use the latest technologies and features available, in addition to many features that Impowersoft has pioneered.

Safeer really got my attention when he said that a user does not have to go to the beginning of a process to pick up the process or to look at what you have done during a process. "Hot Buttons"

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allow the user to move between processes with more ease and efficiency. The goal is to improve workflows through the "everything at a glance" method. If users don't have to hunt for information, their workflows and processes will be more efficient.

An automated process example is a thank you letter that is automatically generated when a new policy is bound in the system. The agency may also define a follow-up letter or e-mail to touch base with the customer in the future. Other automated items are being explored that agencies have said would improve their workflow. In fact, Impowersoft has chosen a group of agencies to test their product since the onset of development. These agencies have provided valuable feedback that has been taken to heart in the development process.

Early adopters will find that the system does not have an accounting module. However, this module is under development. The system will integrate with QuickBooks by mid-summer 2009. There are a number of agencies that actually prefer using QuickBooks to the integrated accounting in some systems. I am also aware of large agencies that "ditch" the integrated accounting module in the systems they use and use a different accounting tool altogether. So, some agencies won't find the lack of an accounting module much of a drawback.

Mission

Impowersoft's mission is to provide the most innovative, industry-specific customer relationship management applications and IT consulting services that focus on their clients' productivity and efficiency. The vision is to become the leader and industry benchmark in providing the most enhanced and future-thinking software products, all the while providing first-class customer service. The goal is to be the preferred choice/premier resource for companies looking to take their businesses to the next level. Impowersoft accomplishes this by offering advanced quality products and services at competitive prices in the market and catering to exactly what the users have been lacking by using outdated legacy systems. Impowersoft has adopted a business model that focuses on constant improvements in the products, services, and business processes/technology through a continuous feedback loop with their clients.

Overview

Aspire is a full Web-based application built using Microsoft's .NET Framework 3.5 for the insurance industry. This product is designed to allow agents to enhance productivity, increase efficiency, market to their clients like never before, and allow for a constant connection to their office from anywhere in the world.

The good stuff

While others are still providing non-Web, legacy-based applications or hybrid Web-based infrastructures, Aspire takes it to the next level and beyond. What does this mean?

- A unique User Interface (UI) for the insurance industry
- Increased speed and stability for immediate access from any Web-capable computer or mobile device
- Outlook integration
- Seamless software upgrades (when new features are added)
- No temporary or permanent patches
- No need for anyone to take control of your computer and office infrastructure
- Enhanced searching capabilities
- Automated e-mail and reporting
- Ability to partner with companies providing ground-breaking applications
- Fax integration (optional)
- Phone system integration (optional)
- Comparative rater

The intuitive user interface was inspired by the Impowersoft core product, Swift. The user interface and enhanced CRM provides users with:

- Customizable dashboard based on individual user preference
- Ability to drag and drop dashboard screens
- Information at a glance
- Birthday reminders
- Renewal reminders
- Assigned tasks

The ability for users to customize their preferences allows them to get only the portions of the software they need on a daily basis. This means less clicks are necessary to finish a desired task. The same is true of the drag-and-drop dashboard screens. The entire concept of this product's design is to provide users with the tools to do their work in the most efficient manner possible.

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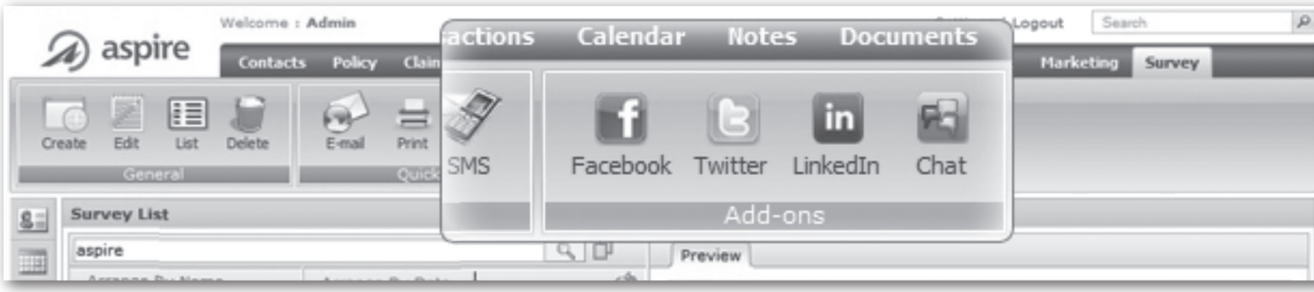
Leading edge features

- Integrated Google Maps with synchronized dual view
- SMS/Text Messaging
- Automated and ad-hoc alerts from the agent to the customer, which can be customized to fit any agent’s needs, but are most commonly used for:
  - Policy renewal reminders
  - Binding confirmation of policies
  - Mass texting for holidays, birthdays, anniversaries
  - Agent-created messages for specific events such as payments posted, payment reminders, insurance recommendation requests, etc.
  - Customized messages to fit agency initiatives and advertising plans
- Mobile device access
- AspireCHAT
- Intuitive User Interface and CRM (see above)
- Future-thinking design and layout
- Cross-browser and platform compatibility (Internet Explorer, Firefox, Safari, Opera to name a few)
- Complete control of contacts including personal, business, vendors, and employees
- Personalized access with privacy settings
- Drill-down reports of contacts and activities
- Multiple avenues for communication (e-mail, SMS, fax)
- Social networking integration via Facebook, Twitter, and LinkedIn
- Full marketing module for surveys, newsletters, mass e-mailing/text messaging, and more
- Less time for training, more time for growing your business.

I want to call attention to social networking in the above list. Many of you may still be hesitant about social networking. However, it’s time to consider how to use these tools in your business and allow your staff to use the tools as well. Your agency probably already has clients who are part of the social networking generation. If you don’t engage them, they will go where they will be engaged. If other agency management systems are even thinking about this, I am not hearing any plans about how they plan to integrate social networking into their systems.



Aspire offers social networking integration via Facebook, Twitter, and LinkedIn.

With Aspire, the buttons for Facebook, Twitter and LinkedIn are embedded (see screenshot above). They are set up to interface only with the agency's presence at each of these sites.

Another important item in this list is the marketing module. This module allows agencies to set as many as 10 different marketing scenarios. The "drip" marketing process has been automated. Agencies have struggled for years to manage this process. Most that are successful complete this process outside their agency management system.

In short

I believe this system has great promise. I am looking forward to watching this team continue to develop, market, and find their place in our industry with this product. For further information about the product, see *www.TomorrowIsHere.com*.

Patricia Alexander, CIC, is a Consultant, Coach & Mentor. Her many years of experience in retail agency and MGA settings gives her a broad range of knowledge in agency operations. She is dedicated to educating her clients on using their technology to enhance and build their business and profitability. Subscribe to Pat's Blog via her Web site *www.patalexander.com*. She may be reached at *pat@patalexander.com*.

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- You'll get your own high-priced efficiency expert who can spot weak links and information log-jams within your agency (at best, these are costing you time and money and, at worst, are a liability lawsuit waiting to happen!).
- You'll get an experienced middle-manager who will gently walk your rank-and-file employees through the essential learning necessary in order for your agency to integrate today's agency technology requirements.
- You'll get a big-picture, technology-savvy partner who intimately knows the "ins and outs" of the insurance industry (but a partner you never have to share profits with!).
- You'll get your own legal filing clerk and hot-shot attorney on staff, protecting you by making sure that you have full and necessary documentation at your agency's fingertips to protect not only you, but your clients, in the event of a potentially litigious "misunderstanding."
- You'll get a personal translator to communicate your tech needs into techie geek-speak so that your IT people are truly able to understand and implement what it is that you need.
- And probably, most important of all, when you subscribe to *The Anderson Agency Report* you'll get an organizational, efficiency, and strategic-planning expert working for you. Their job is to simplify, prioritize, and put into perspective the myriad of details (which can so easily bog an agency down!).

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