CATALYIT

The State of Tech in Independent Insurance Agencies

AUGUST 2022

Partnering with Big I state associations, Catalyit surveyed independent insurance agencies across the country to learn about their current tech stack. Agencies shared what solutions they're using and how they would rate them.

This report shares findings from that survey, and insights on how each area impacts agency value.

Catalyit.com

Edition 1

About This Report

RESPONDENT PROFILE

The source of the data presented was gathered from the Catalyit Tech Stack Survey in 2022.

Number of Employees	Number of Responses	Percentage of Total Respondents
1-5	109	36%
6-10	59	19%
11-20	53	17%
21-50	40	13%
51-100	17	6%
Over 100	25	8%

Estimated Total Revenue	Number of Responses	Percentage of Total Respondents
Less than $500K	47	15%
$500K - $1MM	57	18%
$1MM - $2MM	55	18%
$2MM - $3MM	24	8%
$3MM - $5MM	36	11%
More than $5MM	53	17%
Did not share	42	13%

States Included:

Alabama	Illinois	New Mexico
Arizona	Lousiana	New York
California	Maine	North Carolina
Colorado	Michigan	South Carolina
Connecticut	Minnesota	Texas
Florida	Mississippi	Washington
Idaho	Nebraska	Wisconsin
	New Jersey	

READING THE DATA

Data has been self-reported by agency leaders and staff using their knowledge and interpretations of internal platforms. Responses have been aggregated, and top trends are included here. Many additional platforms were shared but did not reach the threshold to be mentioned.

AGENCY VALUE IMPACT

Insights provided by Carey Wallace from Agency Focus.   carey@agency-focus.com | 614.657.2674

QUESTIONS

Catalyit.com | hello@catalyit.com | 615.599.0085

Catalyit.com

What's a Tech Stack?

All the technology, software, and tools you use to run your agency, connect with customers and prospects, and ultimately grow profitability.

Technology is no longer just a backroom activity that keeps the computers running. Tech is a profit center. What software agencies use, what tools, integrations, processes, and data agencies harness are all critical in driving profit. With the right tech, your agency will thrive.

Your business has a tech stack. Does it currently include the right solutions for your agency? Are you using all the features you should be? Do you have processes in place to get the most out of that investment? To provide a fantastic customer experience? To become more profitable? Catalyit.com helps with all of that.

Your Tech Stack Evolves as Your Journey Continues

The Catalyit Success Journey™

Baseline
Building a strong foundation

Better
Building stronger structures

Best
Ranked in Top 25%

Beyond
Eager adoption of new trends

The Catalyit Success Journey™
Technology changes and evolves, and your agency changes and evolves. Where you are on the path today is vastly different than where you'll be in five years. The Catalyit Success Journey™ gives you a roadmap for your tech stack.

There are 4 main benchmarks on your success journey: **Baseline**, **Better**, **Best**, and **Beyond**. You likely have areas of your tech in more than one milestone. Our goal is to help you become the agency hero who moves your tech through best and beyond.

There isn't a 'one-size fits all' best, but there is a best for your agency. **Visit Catalyit.com for tech stack recommendations for each journey milestone.**

Let's dive into what tech agencies currently use and how they feel about it.

Agency Management System

Does your agency use an Agency Management System?
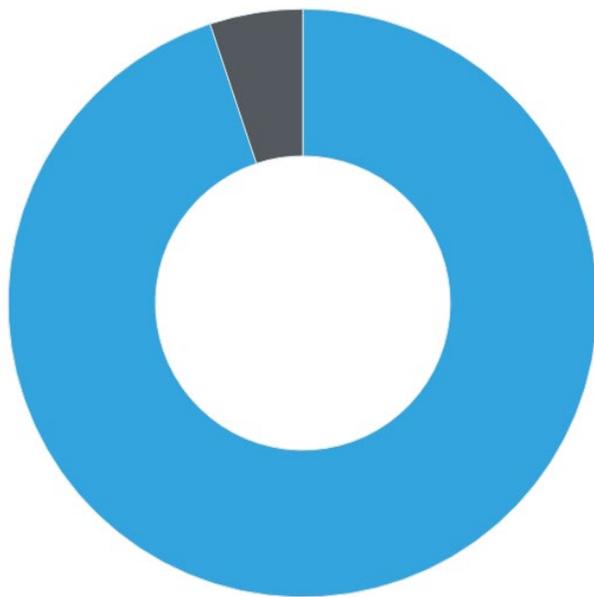
Yes 95%   No 5%

(Percentage based on 314 responses)

Most Used	% Use	Avg. Rating
Applied Epic	27%	4.1
Vertafore - AMS360	23%	4.0
Applied TAM	13%	4.1
Hawksoft	9%	4.5
EZLynx	8%	3.5
Vertafore - QQCatalyst	4%	3.7
NASA	3%	4.0
Agency Software Pro	1%	4.3
Applied Doris	1%	3.7
Agency Matrix	1%	3.3

A DEEPER DIVE: *Most Used by Agency Revenue*

Agency Revenue	Top 3 Platforms Used*
Less than $500K	EZ Lynx, AMS360, Hawksoft
$500K - $1MM	AMS360, Applied Epic, Hawksoft
$1MM - $2MM	AMS360, Applied Epic, Applied TAM
$2MM - $3MM	Applied Epic, Hawksoft, AMS360
$3MM - $5MM	Applied Epic, Applied TAM, AMS360
More than $5MM	Applied Epic, AMS360, Applied TAM

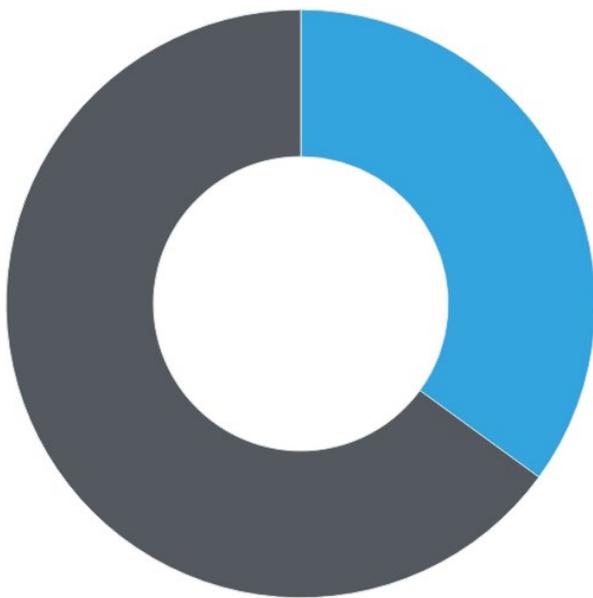*From left to right: most used, second-most used, and third-most used*

INSIGHTS

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AGENCY VALUE IMPACT

How an agency management system is used impacts an agency's ability to measure, report, and act on its data. The type of system in place, or lack of it, will affect their ability to recruit talent and limit potential buyers . Being able to analyze and transition information systematically will increase an agency's value. If an agency doesn't use an AMS, they should expect a lower multiple due to the uncertainty of information and the time and effort required to transition the book of business in an external sale.

Accounting Platform

Does your agency use an accounting platform?

Most Used	% Use	Avg. Rating
QuickBooks	47%	4.0
Applied Epic	9%	4.3
Vertafore - AMS360	6%	4.2
Applied TAM	4%	4.0
Quicken	3%	3.7
Next Agency	1%	4.0
Oracle	1%	4.0

■ Yes 35%   ■ No 65%

(Percentage based on 314 responses)

INSIGHTS

Quickbooks rules the field here, with few agencies taking advantage of the features built into their other tech. One thing to consider: QuickBooks does not handle insurance trust accounts very well and may result in state trust law compliance problems.

AGENCY VALUE
IMPACT

An agency that utilizes an accounting system to produce accurate and timely financial reports, including a balance sheet and income statement, will increase its value, as the level of uncertainty in that agency is reduced. Those agencies measuring and managing performance based on these reports are more likely to have a healthy profitability ratio, a greater understanding of their business, and ultimately a higher value.

Agency License Compliance

Does your agency use a platform to track agency license compliance?

Most Used	% Use	Avg. Rating
Sircon	17%	4.0
Agency management system*	5%	4.0
A state-specific system**	3%	3.5
Acrisure Home Office	2%	5.0
AgentSync	2%	5.0
BetterCE	2%	5.0
CSC	2%	4.0
ILSA	2%	5.0
Insurity	2%	3.0
License Logix	2%	5.0

*A feature through their agency management system
**NIPR, SBS, etc.
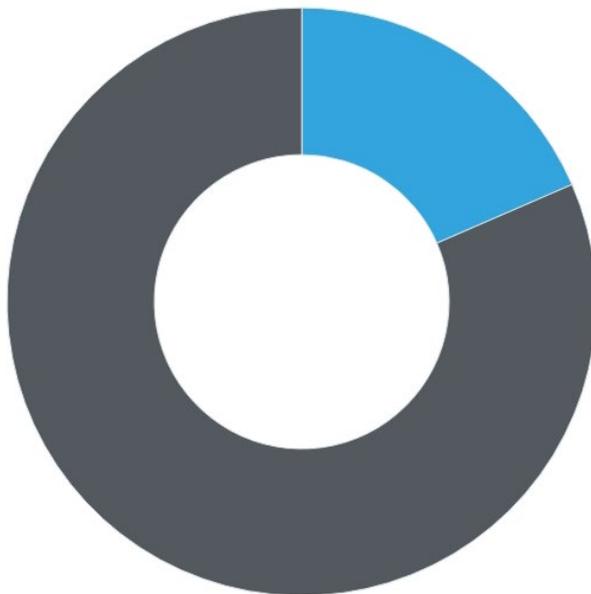
■ Yes 18% ■ No 82%

(Percentage based on 314 responses)

INSIGHTS

Managing licenses and CE as the agency grows can become a significant drain on resources. Having the right system in place can ease the burden and help alleviate potential problems with commission payments if producers are not properly licensed.

AGENCY VALUE
IMPACT

Agencies that can demonstrate that all licenses are in place and in good standing are better positioned for transition than those that may have unexpected exposures in this area.

Benefits Quoting System

Does your agency use a benefits quoting platform?

Most Used	% Use	Avg. Rating
Applied Rater	10%	4.0
Form Fire	5%	3.5
Vertafore - PL Rating	5%	4.0
Benefit Point	5%	4.0
AE Medicare	3%	5.0
Agency Smart	3%	5.0
Applied Benefits Designer	3%	4.0
Benefit Mall	3%	5.0
Brokerage Builders	3%	4.0
Perfect Quote	3%	5.0
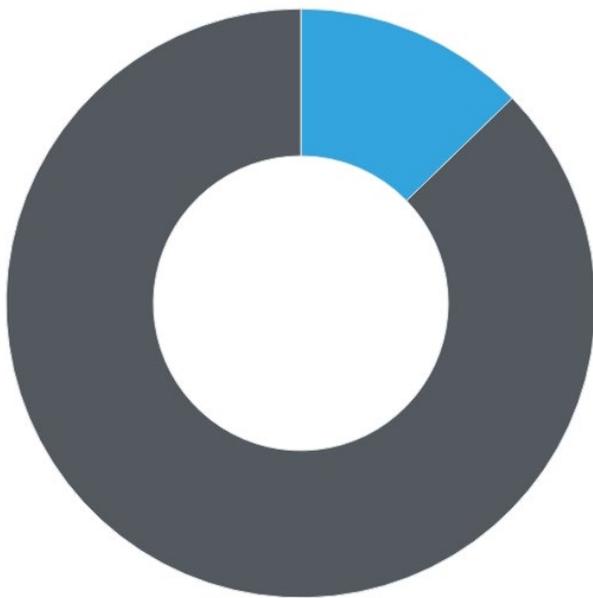
■ Yes 13% ■ No 87%

(Percentage based on 314 responses)

INSIGHTS

The amount of benefits business is growing in many agencies. Benefit departments tend to be less automated, relying on spreadsheets to present proposals.

AGENCY VALUE
IMPACT

Using a quoting system allows an agency to provide quicker responses to their clients, as well as a higher quote-to-bind ratio. This can impact many areas of the agency, including growth, efficiency, profitability, customer satisfaction, customer retention, recruiting, and retention of staff. They will also have more capacity to quote business, improving their ability to write more business with fewer human resources.

Carrier Submission Management

Does your agency use a platform for carrier submission management?
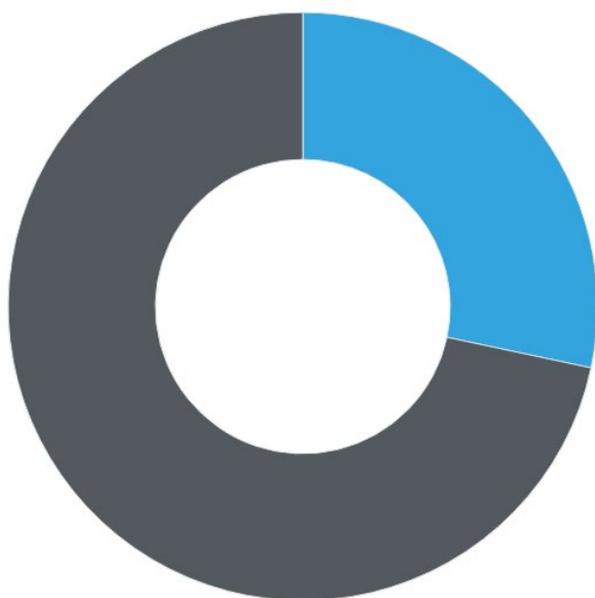
Most Used	% Use	Avg. Rating
EZLynx	15%	3.8
Vertafore - PL Rating	15%	3.8
EPIC Quotes	12%	3.8
Indio	6%	4.0
Tarmika	4%	4.3
Applied Rater	2%	3.5
Appulate	2%	4.0
RealTime	2%	4.0
A carrier website*	2%	4.0
Semsee	2%	4.0

Respondents use a specific carrier's website

■ Yes 28% ■ No 72%

(Percentage based on 314 responses)

INSIGHTS

Lots of opportunities in this category to streamline how CL is handled, as many agencies aren't using a solution yet. And the opportunity to improve products to meet agent needs as the average rating awarded is lower than some of the other categories.

AGENCY VALUE
IMPACT

Using a quoting system allows an agency to provide quicker responses to their clients, as well as a higher quote-to-bind ratio. This can impact many areas of the agency, including growth, efficiency, profitability, customer satisfaction, customer retention, recruiting, and retention of staff. They will also have more capacity to quote business, improving their ability to write more business with fewer human resources.

Chatbot

Does your agency use a chatbot on your website?

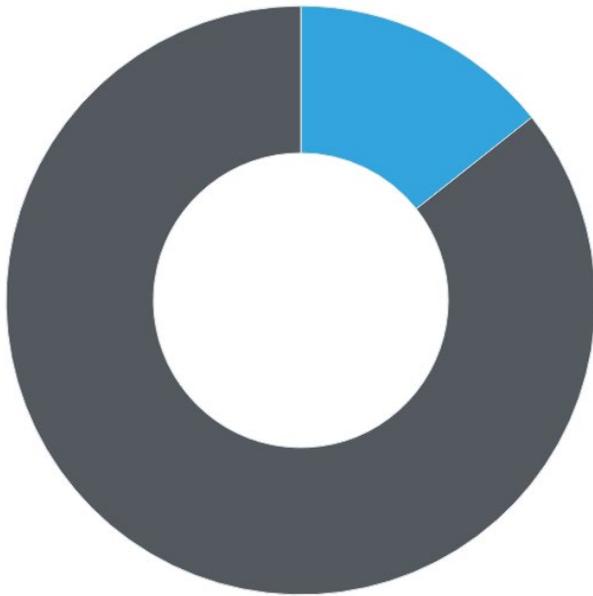| Most Used	% Use	Avg. Rating
Chatra	14%	4.0
Podium	10%	4.5
Chatfuel	5%	5.0
Formilla	5%	5.0
ITC	5%	3.0
Slack	5%	4.0
Tacobot	5%	4.0
ZenDesk	5%	3.0
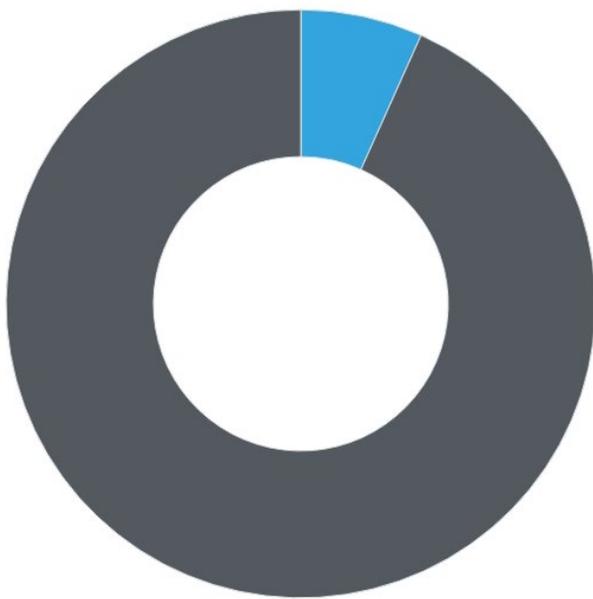
Yes 7% No 93%

(Percentage based on 314 responses)

INSIGHTS

There is a very low percentage of agencies using chatbots. Among those using the tech, there's a large number of solutions shared.

AGENCY VALUE
IMPACT

Providing customers a way to engage with the agency when they want to and how they want to will increase customer satisfaction and employee efficiency. It will appeal to a different customer base, remove friction, and create an ease of doing business with the agency. Increased capacity for the staff impacts growth, profitability, and retention of both customers and employees.

Content Relationship Management (CRM)

Does your agency use a CRM?

Most Used	% Use	Avg. Rating
Agency Revolution	13%	3.6
Levitate	11%	3.8
Agency Zoom	11%	4.7
Salesforce	7%	4.3
Dynamics	4%	3.0
Constant Contact	4%	4.0
Better Agency	4%	4.5
Pipe Drive	4%	4.0
Rocket Referrals	4%	5.0
TechCanary	2%	4.0

■ Yes 14% ■ No 86%

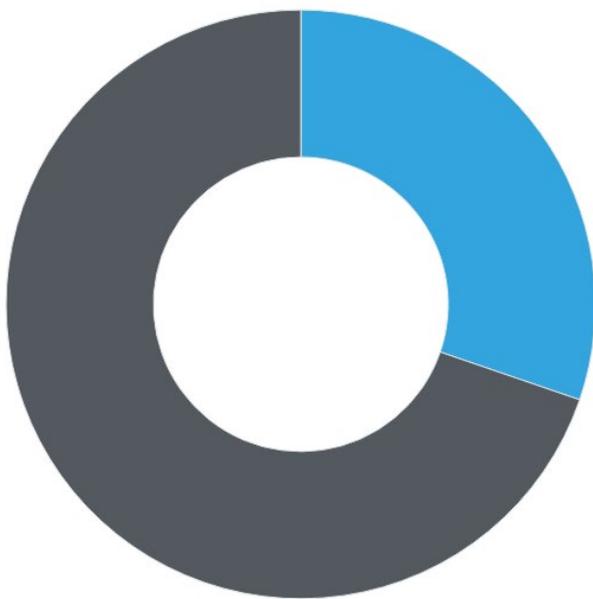*(Percentage based on 314 responses)*

INSIGHTS

The number of agencies not using a CRM is low. Too low. Using a CRM can help an agency create meaningful engagement with customers and prospects and provides useful data.

AGENCY VALUE IMPACT

Using a CRM allows an agency to build a well-developed and well-managed sales process. It provides insights and focus on the customer, as well as the data needed to target customers, niches, and lines of business. This can help an agency focus on their goals by targeting their most profitable customers, a niche, line of business and or carrier appetite to mitigate their risk. Having a way to measure and adjust allows the agency to make data-driven decisions about their allocation of resources. As with any investment, if not implemented and utilized consistently and effectively, it can become a cost center and hurt the value of the agency.

Cybersecurity

Does your agency use a cybersecurity platform/company?

Most Used	% Use	Avg. Rating
Local IT provider	22%	4.7
KnowBe4	3%	5.0
Motiva	2%	5.0
A2Z Business IT	1%	5.0
Adnet	1%	5.0
Appriver	1%	4.0
Archway	1%	5.0
Redbird Security	1%	5.0

Yes 30% No 70%

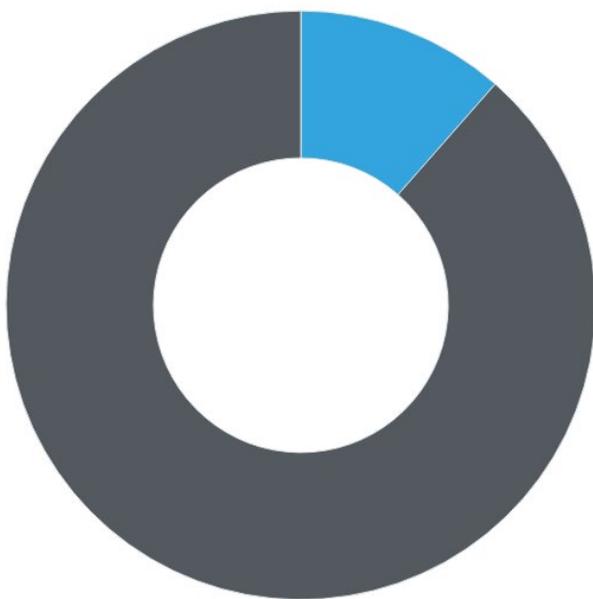*(Percentage based on 314 responses)*

INSIGHTS

With the bulk of agencies using a local provider and 15 percent unsure of who they use, there is no 'most popular provider.' Make sure when choosing a solution that they are knowledgeable of the current regulations for insurance agencies in your state. This is critical for compliance, avoiding fines, and protecting the sensitive data we collect.

AGENCY VALUE
IMPACT

Trust is key to the relationships agencies have with their clients. The sensitive nature of data required makes it essential to have strong security in place. A strong cybersecurity policy will strengthen the value of an agency. If you are in a state with a cybersecurity policy, demonstrating compliance is important.

Data Analytics

Does your agency use a data analytics platform?

Most Used	% Use	Avg. Rating
Applied Analytics	17%	4.4
RiskMatch	6%	4.0
AAI	3%	4.0
AgencyKPI	3%	5.0
Donna	3%	5.0
EZLynx Reports	3%	2.0
Hawksoft	3%	5.0
Insights	3%	5.0
Agency management system*	3%	3.0
Power BI	3%	4.0

A feature through their agency management system

Yes 11% No 89%

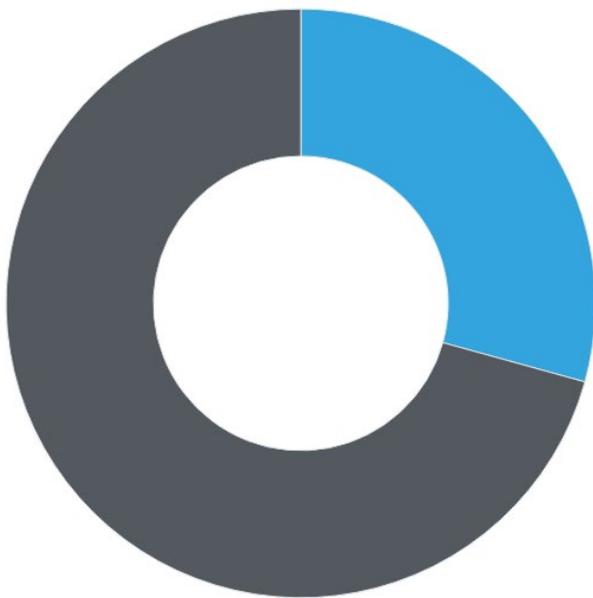*(Percentage based on 314 responses)*

INSIGHTS

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AGENCY VALUE
IMPACT

By utilizing data to drive decisions, an agency is positioned for higher growth retention and profitability. 6x more likely to retain, 23x more likely to acquire new business 19x more profitable. This has a direct impact on the value of an agency. How an agency implements and utilizes these investments is critical to ensuring it produces these results.

Digital Payments

Does your agency use a digital payments platform?

Most Used	% Use	
ePayPolicy	54%	4.6
Carrier online billing*	9%	4.4
Simply Easier Payments	8%	4.3
EasyPay	2%	4.5
Quickbooks	2%	4.0
EZLynx Client Center	1%	3.0
Evalon's Converge Pay	1%	4.0
XpressPay	1%	3.0

Carrier's website has an online billing feature

■ Yes 29% ■ No 71%
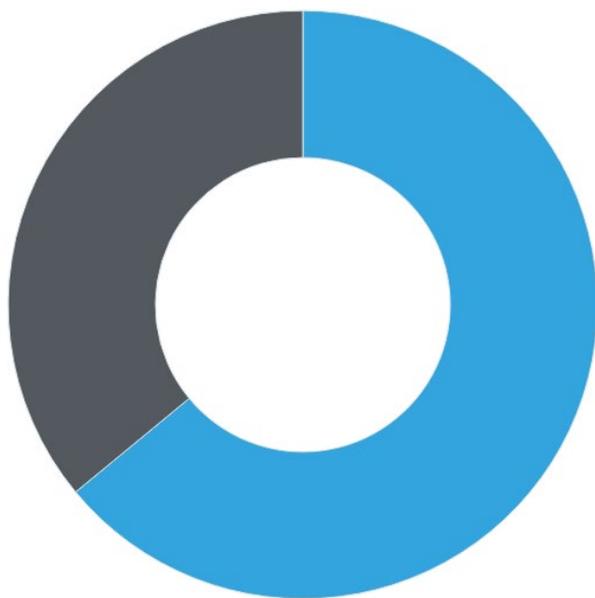
(Percentage based on 314 responses)

INSIGHTS

ePayPolicy is by far the most used platform. This may be partly due to the marketing through and relationship with state associations.

AGENCY VALUE
IMPACT

Customer experience, efficiency, and ease of doing business increase retention, profitability, and potential agency value.

Electronic Signature

Does your agency use e-signature?

Yes 64% No 36%

(Percentage based on 314 responses)

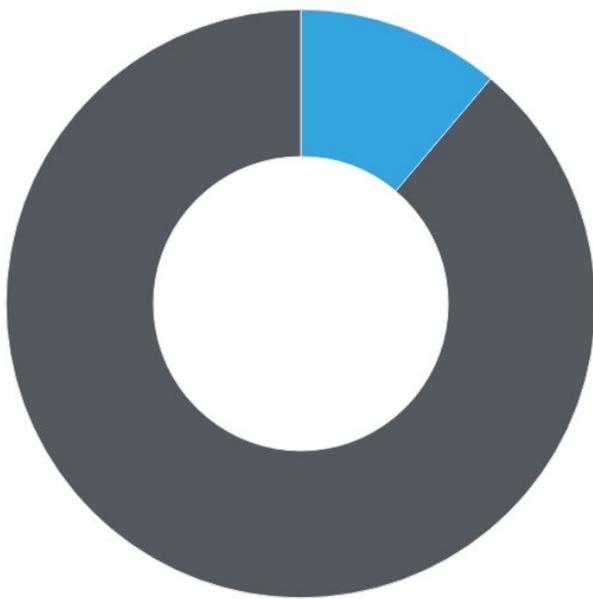| Most Used	% Use	Avg. Rating
DocuSign	36%	4.6
Formstack	12%	4.4
Adobe Sign	10%	4.2
RPost	9%	4.1
AssureSign	3%	4.3
Hello Sign	3%	4.4
Right Signature	3%	4.0
Bridge	1%	3.5
Insuresign	1%	5.0
FoxIt	1%	5.0

INSIGHTS

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AGENCY VALUE
IMPACT
Customer experience, efficiency, and ease of doing business increase retention, profitability, and potential agency value.

Lead Generation

Does your agency use a lead generation service?

Most Used	% Use	Avg. Rating
Zywave	17%	3.6
Trusted Choice	6%	4.5
Acrisure	3%	4.0
Bullseye	3%	4.0
A cold calling service	3%	3.0
Everquote	3%	3.0
EZLynx	3%	3.0
Internal sales team	3%	5.0
Salespro	3%	4.0

■ Yes 11%   ■ No 89%

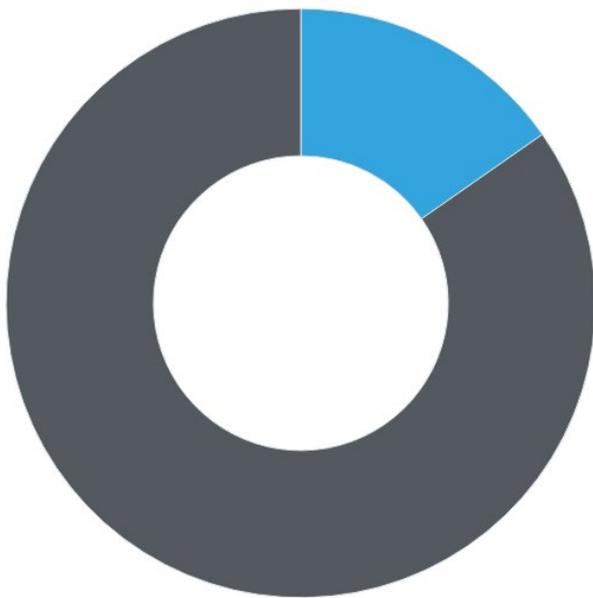*(Percentage based on 314 responses)*

INSIGHTS

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AGENCY VALUE
IMPACT
A lead generation platform can create higher profitability and agency value, as long as the leads generate sales that provide more revenue than the overall cost of the platform.

Marketing Automation Platform

Does your agency use a marketing automation platform?

Yes 15%   No 85%

(Percentage based on 314 responses)

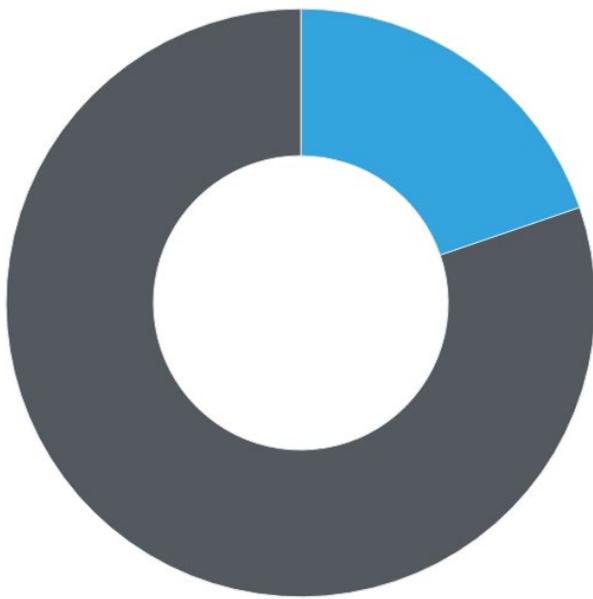| Most Used	% Use	Avg. Rating
Applied Marketing Automation	15%	4.4
Agency Revolution	13%	4.2
Agency Zoom	8%	4.3
Rocket Referrals	6%	4.5
EZLynx	4%	2.5
Levitate	4%	4.0
Zywave	4%	2.0
Acrisure	2%	4.0
Better Agency	2%	5.0
MailChimp	2%	4.0

INSIGHTS

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AGENCY VALUE IMPACT

This can help an agency focus on their goals by either targeting their most profitable customers, staying connected, showing their value, developing a niche line of business , and/or growing in a way to strengthen their relationship with a carrier to reach goals, serve their customers, and mitigate their risk. Having a way to measure and adjust allows the agency to make data-driven decisions about their allocation of resources. As with any investment, if not implemented and utilized consistently and effectively, it can become a cost center and hurt the value of the agency.

Mobile App

Does your agency have a mobile app?

Most Used	% Use	Avg. Rating
Applied CSR24	31%	4.0
GloveBox	6%	4.5
Vertafore - AMS360 Mobile App	5%	3.3
Insurance Agent Mobile App	5%	4.0
Ring Central	3%	3.0
Go Insurance Agent	2%	5.0

Yes 20%   No 80%

(Percentage based on 314 responses)
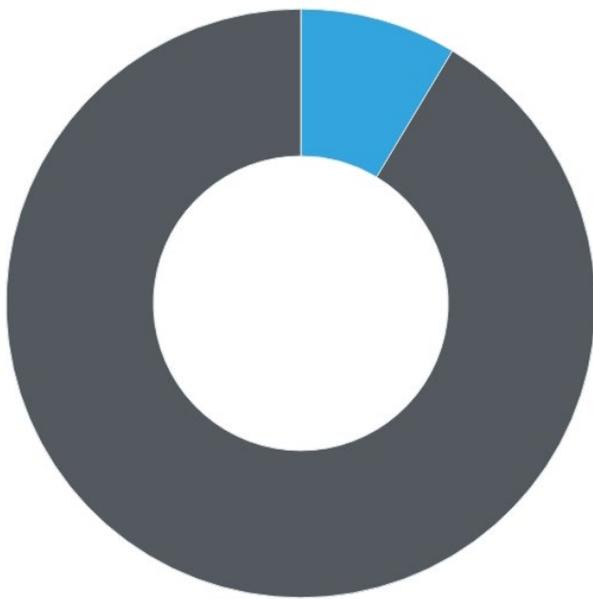
INSIGHTS

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AGENCY VALUE
IMPACT

Providing customers a way to engage with the agency when and how they want will increase customer satisfaction and employee efficiency. It will appeal to a different customer base, as well as remove friction and ease of doing business with the agency. It can create greater capacity for the staff, impacting growth, profitability and retention of both customers and employees.

Outsourcing

Does your agency use an outsourcing service?

Most Used	% Use	Avg. Rating
Resource Pro	15%	4.4
Patra	11%	4.2
Agency VA	7%	4.3
Exidon	7%	4.5
Fusion Business Solutions	7%	2.5
Agency Administrators	4%	4.0
Cover Desk	4%	2.0
Marblebox	4%	4.0
WAHVE	4%	5.0

Yes 9%   No 91%

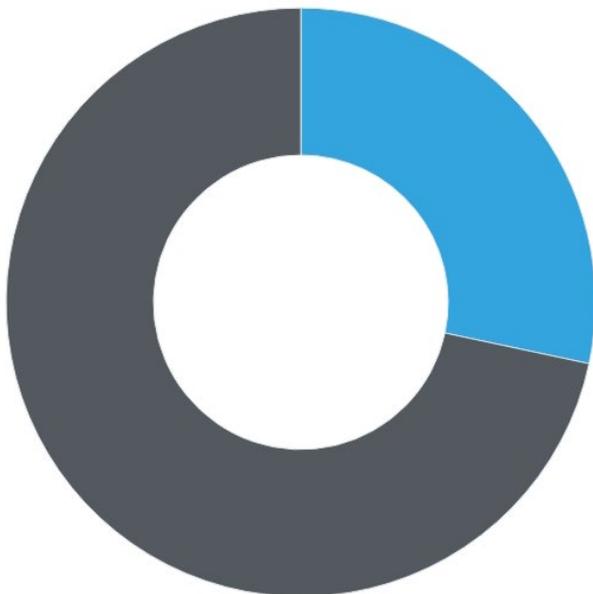*(Percentage based on 314 responses)*

INSIGHTS

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AGENCY VALUE
IMPACT Outsourcing can reduce your largest expense - payroll and benefits, increase efficiency and lead to profitability. Consider supplementing your staff and higher-paid employees with virtual assistants.

Quoting - Commercial Lines

Does your agency use a quoting platform for commercial lines?

Most Used	% Use	Avg. Rating
Applied Rater	15%	3.2
Tarmika	9%	4.3
Vertafore - AMS360	7%	3.0
Zywave	4%	3.7
EZLynx	3%	3.7
Semsee	3%	3.5
Bold Penguin	2%	2.5
Cover Wallet	2%	4.0
Hawksoft	2%	5.0
Appulate	1%	4.0

■ Yes 28% ■ No 72%

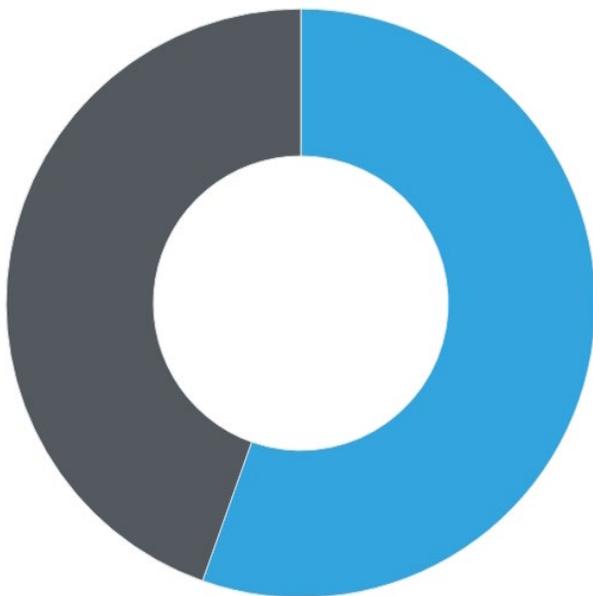*(Percentage based on 314 responses)*

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AGENCY VALUE
IMPACT

Using a quoting system allows an agency to provide quicker responses to their clients, as well as a higher quote-to-bind ratio. This can impact many areas of the agency, including growth, efficiency, profitability, customer satisfaction, customer retention, recruiting, and retention of staff. They will also have more capacity to quote business, improving their ability to write more business with fewer human resources.

Quoting - Personal Lines

Does your agency use a quoting platform for personal lines?

Most Used	% Use	Avg. Rating
Vertafore - PL Rating	43%	4.2
EZLynx	22%	3.9
Applied Rater	16%	3.7
Turborater	2%	4.5
Connecture	1%	4.0
Hawksoft	1%	5.0
IBQ	1%	4.0
RBS Services	1%	5.0
Semcat	1%	3.0
Silverplume - Auto Only	1%	4.0

■ Yes 55% ■ No 45%

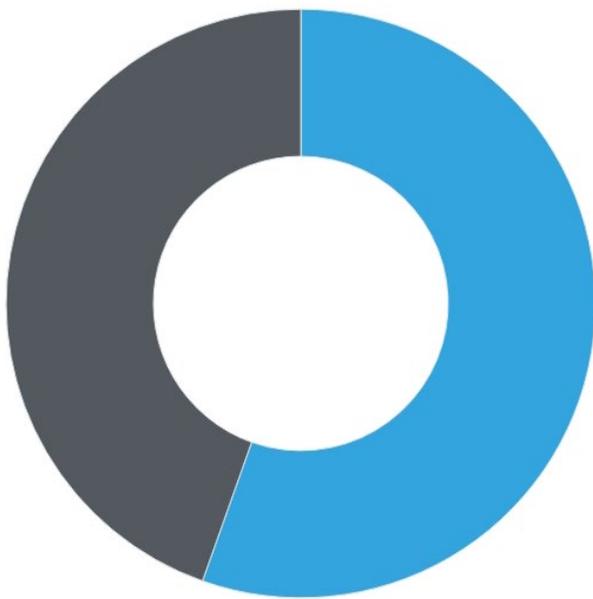*(Percentage based on 314 responses)*

INSIGHTS

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AGENCY VALUE
IMPACT

Using a quoting system allows an agency to provide quicker responses to their clients, as well as a higher quote-to-bind ratio. This can impact many areas of the agency, including growth, efficiency, profitability, customer satisfaction, customer retention, recruiting, and retention of staff. They will also have more capacity to quote business, improving their ability to write more business with fewer human resources.

Reputation Management System

Does your agency use a reputation management platform?

Most Used	% Use	Avg. Rating
Rocket Referrals	27%	4.0
Google Reviews	9%	3.0
Insuredmine	9%	4.0
Podium	9%	5.0

Yes 55% No 45%

(Percentage based on 314 responses)

INSIGHTS

Faccusa pro il et omnia eat. To coreroreiunt et laccab id quametur? Pa nimus doluptis dolent volendebit, ant, quod erchill upiendu ntibus dolorro maxime sequasi nonecup turio. Nequibusam archil estrum samus aut quaes aniat

AGENCY VALUE
IMPACT
Increase customer satisfaction and employee training opportunities lead to higher customer retention and employee productivity. Both lead to higher potential agency profitability and value.

Sales Management

Does your agency use a sales management platform?
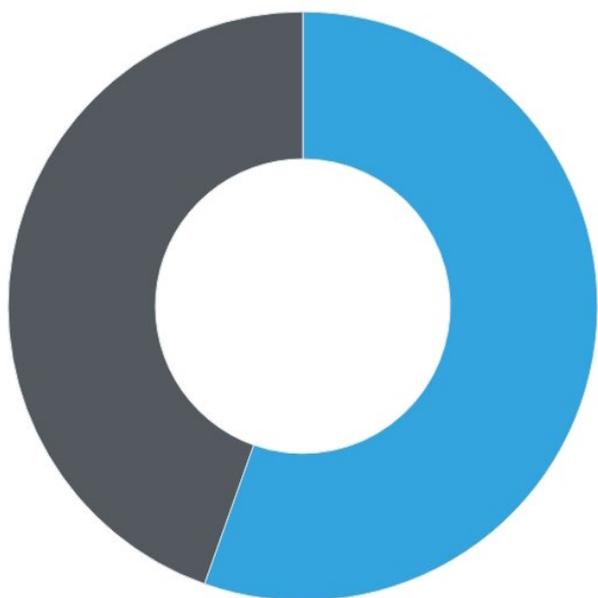
Yes 55%   No 45%

(Percentage based on 314 responses)

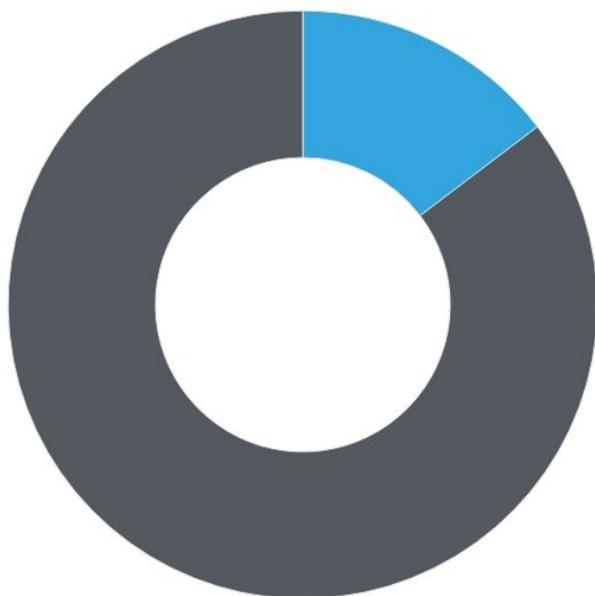| Most Used	% Use	Avg. Rating
Applied Epic	11%	4.8
Agency Zoom	9%	3.5
EZLynx	7%	3.3
Salesforce	7%	3.7
Hawksoft	4%	4.0
Microsoft Dynamics	4%	4.5
Pipe Drive	4%	4.0
Acrisure	2%	4.0
Nexsure	1%	3.0
Next Agency	1%	5.0

INSIGHTS

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AGENCY VALUE
IMPACT
The utilization of a CRM allows an agency to build a well-developed, well-managed sales process. The data provides insights and focus on the customer, niches, and lines of business.

Social Media Management

Does your agency use a social media management platform?

Most Used	% Use	Avg. Rating
Hootsuite	4%	4.0
Sendible	4%	4.0
Rocket Referrals	4%	3.5
Agency Revolution	2%	4.0
Brightfire	2%	4.0
Buffer	2%	4.0
Casilio Communications	2%	5.0
FMG Suite	2%	4.0
Neilson Marketing Services	2%	4.0
LiftLocal	2%	4.0

Yes 15%   No 85%

(Percentage based on 314 responses)
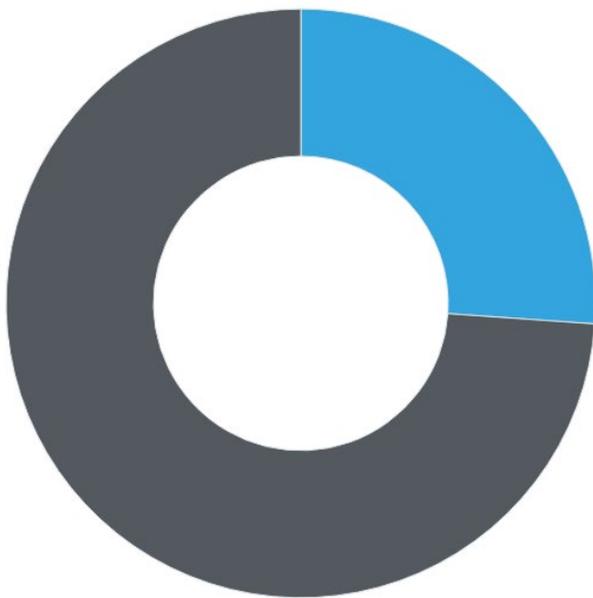
INSIGHTS

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AGENCY VALUE IMPACT

Eighty-five percent go online at least once a day, while 31% report that they are online almost constantly. Seventy-nine percentof insurance consumers do online research, and 89% do not have a company in mind. Ninety-eight percent read online reviews, and 78% call after a search.Having a strong online presence allows you to be found by potential customers, increasing your potential new business, profitability, and agency value.

Text Messaging Platform

Does your agency use a text messaging platform?

Yes 26% **No 74%**

(Percentage based on 314 responses)

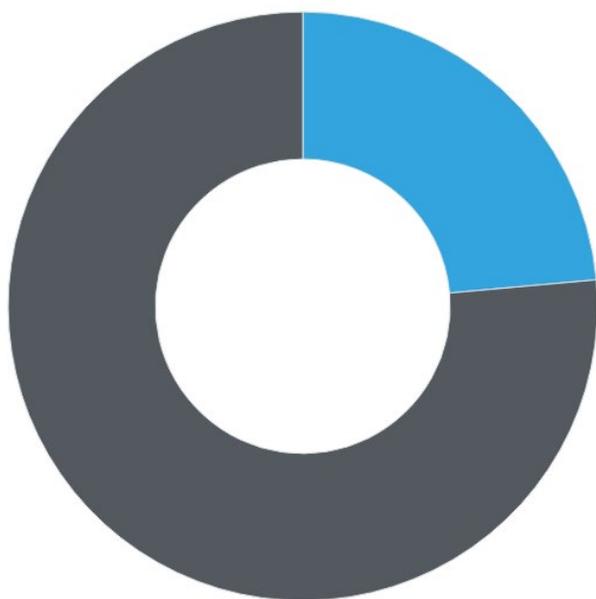| Most Used	% Use	Avg. Rating
Bridge	18%	4.0
Applied Epic	10%	3.3
Ring Central	10%	4.4
EZLynx	7%	4.0
Podium	6%	4.8
AMS360	5%	4.0
Better Agency	2%	4.5
Fuze	2%	5.0
GoTo Connect	2%	4.0
Text Request	1%	5.0

INSIGHTS

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AGENCY VALUE
IMPACT

Providing customers a way to engage with the agency when and how they want will increase customer satisfaction and employee efficiency. It will appeal to a different customer base, as well as remove friction and ease of doing business with the agency. It can create greater capacity for the staff, impacting growth, profitability and retention of both customers and employees.

Video Conferencing Platform

Does your agency use a video conferencing platform?

Most Used	% Use	Avg. Rating
Zoom	50%	4.3
Microsoft Teams	23%	4.2
Ring Central	7%	4.4
Webex	4%	5.0
Citrix	1%	4.0
Fuze	1%	5.0

■ Yes 24% ■ No 76%

(Percentage based on 314 responses)

INSIGHTS

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AGENCY VALUE
IMPACT
People do business with those they know, like, and trust. Video allow us to communicate in a much more holistic way than just email ortext. Higher reach, engagement, and sales efficiency impact close ratio, profitability and value.

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VoIP System

Does your agency use a VoIP phone system?

Yes 37%   No 63%

(Percentage based on 314 responses)

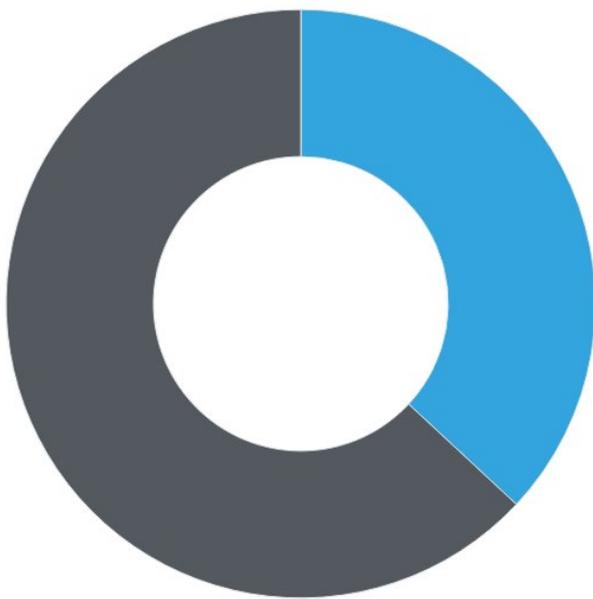| Most Used	% Use	Avg. Rating
Ring Central	22%	4.1
Nextiva	8%	3.8
GoTo Connect	5%	4.0
Lightspeed	4%	4.4
Mitel	4%	4.3
Vonage	4%	4.8
Yealink	4%	4.6
Ooma	3%	4.3
3CX	2%	3.5
Comcast Business Voice Everywhere	2%	4.5

INSIGHTS

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AGENCY VALUE
IMPACT

Making unstructured data available to be analyzed and turned into insights for the agency drives performance and value.

Website Development

Does your agency use a website development platform/service?

Most Used	% Use	Avg. Rating
Forge3	13%	4.5
Local firm	5%	4.2
Advisor Evolved	4%	5.0
Developed in house	4%	4.0
ITC	4%	4.0
Banyan Theory	3%	4.0
WordPress	3%	4.3
Agency Relevance	2%	4.0
Agency Revolution	2%	4.5
Brightfire	2%	4.0

■ Yes 31%　■ No 69%

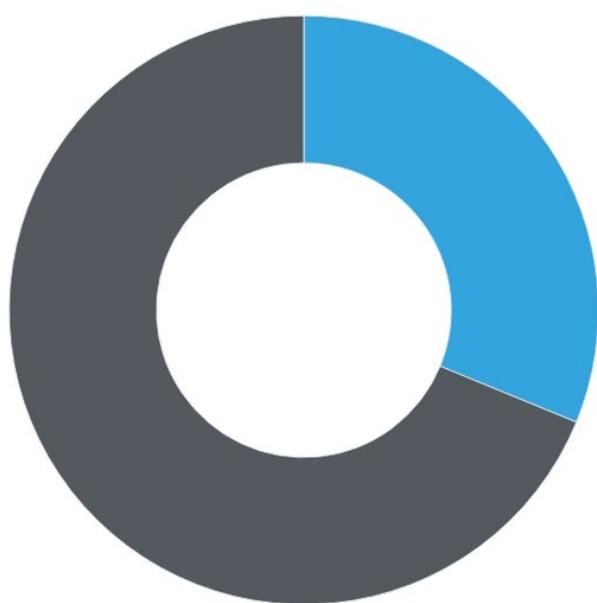*(Percentage based on 314 responses)*

INSIGHTS

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AGENCY VALUE
IMPACT

With staff information, agency culture and values, pictures, and video, your website allows potential customers to learn about your agency online. Your website positions you to generate more leads by creating a great first impression. This can increase sales, as well as increase your agency profitability and value.

Overall Takeaways

Nam quam et fugiam, quias quianda ntiatur alis apelibus estrum ut voluptur ratis voluptatur?

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Sincere Thanks to Our Premium Solution Providers

These companies have chosen to support independent agent access to the tech insights they need to thrive through Catalyit! They really 'get it!'

CATALYIT

All the agency tech guidance you need... **in one place.**

The number of ways you can leverage tech to increase profits and serve customers is nearly unlimited. But time, know-how, and fear of risk are getting in the way.

Catalyit solves it for you.

What you gain as a Catalyit subscriber:

- **Tools:** The Catalyit Success Journey, and our in-depth tech assessment, provide you with an analysis of where you are with tech and a custom roadmap for success.

- **Guides & Reviews:** Our topic guides share insights, help you compare solutions in minutes, and include reviews.

- **Training:** From live coaching, Q&A, and hot topic sessions every month to group demos and our on-demand video vault, your team will be able to get the most out of your agency's tech.

- **Community:** Discuss trends, best practices, and challenges with peers, experts, and providers.

- **Consulting:** Need custom, one-on-one support? Our team of experts can work directly with your agency. Need to hand off implementation? We can do that!

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