



SmartLink for Insurance Brokers

Simplifying communication among Brokers and Brokerage General Agencies

Effective communication of underwriting activity and case status between BGAs and brokers is critical. Unfortunately, that communication typically requires a significant investment of time and duplication of efforts for both the broker and the BGA. By automating the communication of pending case underwriting activity details from the BGA to the broker, brokers can have current underwriting status on their pending cases at all times — freeing up time to address more business-focused topics, such as resolving underwriting issues or exploring new sales and marketing opportunities.

Brokers Get the Case Information They Need — Where They Want It, When They Need It!

SmartLink for Insurance Brokers, available as an add-on module to SmartOffice®, makes it easy to share critical case information between two SmartOffice databases. Using the link, SmartOffice BGAs can propagate status updates directly to a broker's SmartOffice database automatically and in near real time, significantly reducing the need for phone updates and virtually eliminating manual re-entry of data by the broker. Cases created and maintained by the BGA are automatically duplicated and refreshed in the broker's database via the SmartLink. This includes:

- Submitted application details
- Parties on the application
- Relationships and percentages
- Riders
- Underwriting and delivery requirement activity details
- Ratings
- Approvals
- Underwriting milestone dates

The result: more efficient, timely, and complete communication and a higher standard of service between BGAs and their brokers.

DATASHEET

- Deliver 'hands-free' case updates to your brokers in near-real-time
- Eliminate phone time spent answering status questions
- Eliminate duplication of efforts maintaining underwriting activity details
- Provide better service to your brokers and their clients
- Create more productive, hassle-free business relationships

SmartLink for Insurance Brokers provides these valuable features:

- > **Automated Data Distribution** provides BGAs with a simple method for providing current case information to their brokers. Once configured, all updates to cases managed by the BGA are **automatically** propagated to the appropriate brokers' databases.
- > **Near Real-time Updates** allow brokers to access current pending case data as it is being updated by the BGA. They can confidently report the status of cases to their prospects and clients using the information in their own database — without having to go back to the BGA for a status update.
- > **Seamless Integration** makes updates transparent to both the BGA and the broker. SmartLink automatically completes data updates at pre-configured time intervals — no action is needed by either party to initiate the transfer of information.
- > **A Web-based Solution** provides both the broker and the BGA with access to up-to-date case information, when they need it — regardless of where they are or where the data originates. By linking the broker and bases, both teams gain the benefits of having centralized case information on the web, access to real-time case data, and the power to easily and effectively deliver a higher level of service to clients.

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