



*EZLynx*.<sup>®</sup>

**Everything You Need  
To Run Your Agency**

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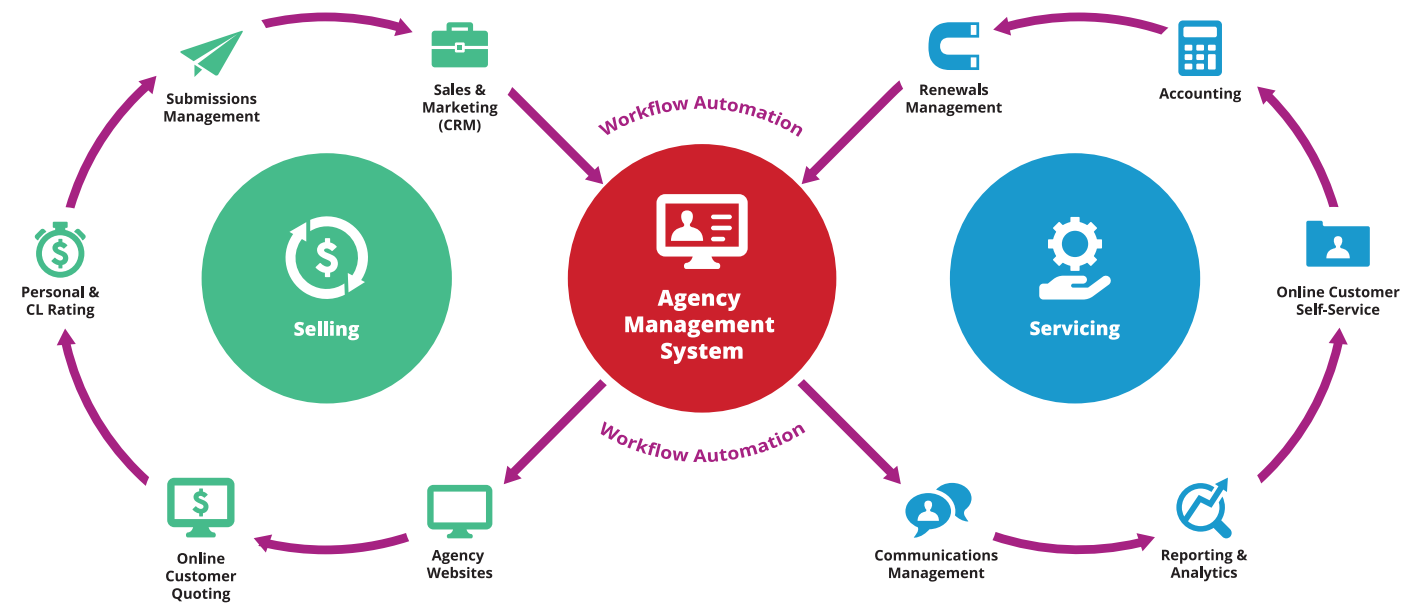


## Why choose EZLynx to run your agency?

EZLynx® develops industry-leading, cloud-based software that empowers modern independent insurance agents to operate their businesses more efficiently. Each EZLynx product integrates with our comparative rater and agency management system on a single platform.

## The Complete Customer Lifecycle

EZLynx products support all phases of the customer lifecycle. This product guide will take you through each tool necessary to grow your business.



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# EZLynx Management System™

Maximize your agency's potential with our cloud-based, easy-to-use management system.

## Benefits



### Improve Productivity

Built on EZLynx Rating Engine, leverage one system to manage new applications, quote, create proposals, and complete ACORD forms and certificates without rekeying data.



### Simplify Management

Reports and dashboards provide high-level views of activities and completion rates for tasks. Commission tools simplify tracking and management of payments.



### Increase Profitability

Streamlining and automating repetitive activities allows agencies to focus on growing. Reports, like Agency Pulse®, deliver accurate business insights that owners can use to make data-driven business and marketing decisions.



### Optimize Serviceability

Stay competitive with an omni-channel approach to policy issuance and servicing. A robust set of communication and self-servicing tools allows your customers to get service their way!



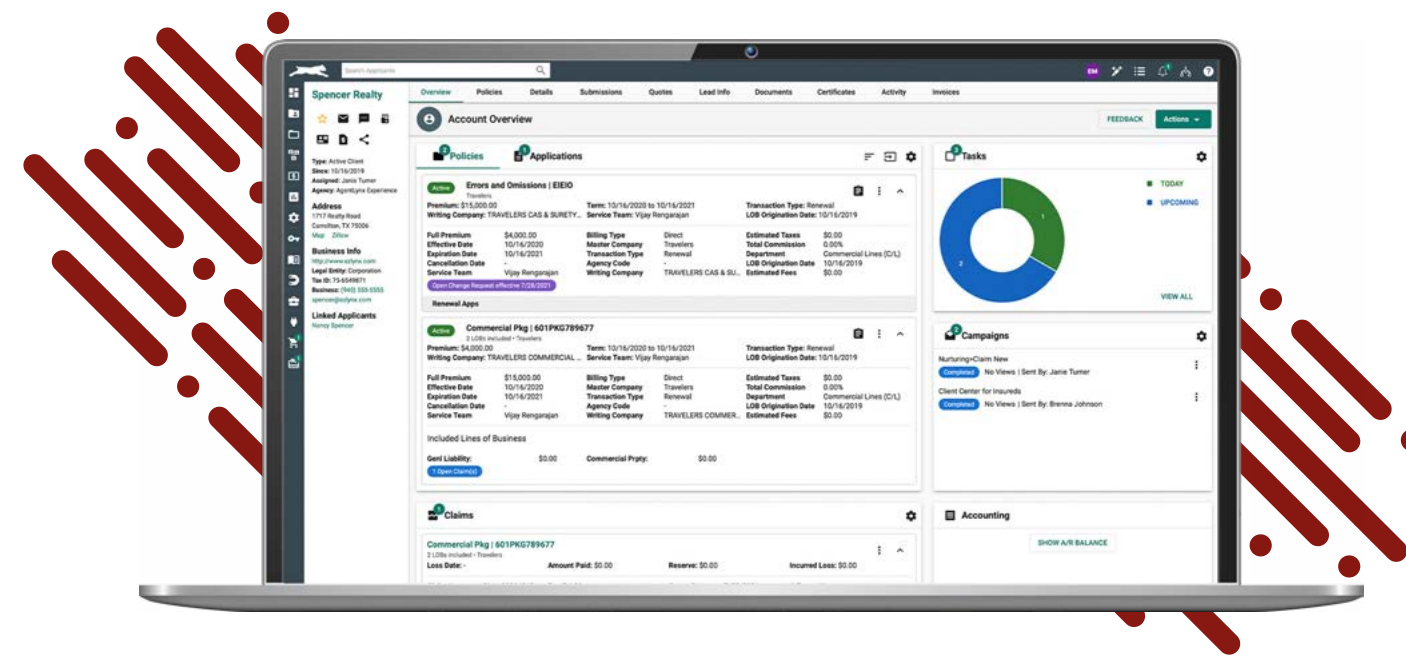
### Agency Workspace

This robust collaboration tool streamlines activities agency wide. Keep everyone on track with notes, tasks, checklists, reminders and notifications.

# 1

## Manage & Run Your Agency from Anywhere

Manage current policies, documents, clients, tasks, and so much more.



## Features

- Agency Workspace
- Agency Pulse®
- Policy Sync & Compare
- Policy Downloads
- Quote Tracking
- Policy Entry
- Application Entry
- Commercial Proposals
- Commercial Imports & Exports
- Commercial Certificates Management
- Commercial Application Bundling
- Claims
- Commissions
- Document Management
- Set and Track Performance Goals
- Carrier eDocuments (eDocs)





# EZLynx Agency Websites™

Provide a seamless, mobile-optimized user experience with expert digital strategy.

## Benefits



### Retain Leads

Mobile insurance search queries have grown by 150% year-over-year. Our designs automatically adjust to fit all screen sizes.



### Expand Your Reach

Get found in 50 local online business directories consumers use to find professionals like insurance agents.



### Make a Great First Impression

With 60+ website design choices and customization to match your branding, you get a unique site.



### Custom Content

Custom content writing for service pages and monthly blog articles on topics important to insurance shoppers.



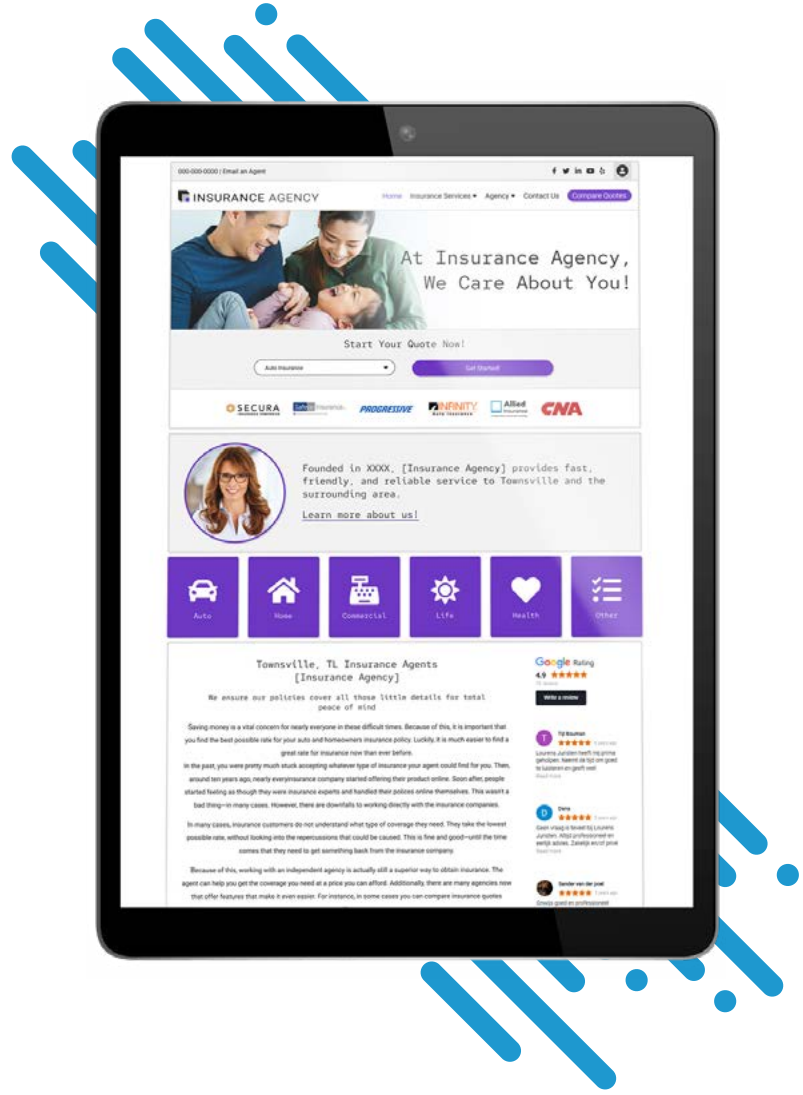
### Professional Guidance

Website specialists walk you through the setup process, host your site, and monitor its performance.

## 2

# Develop a Web Presence

Create a point of access for your customers, get found, and capture leads.



## Features

- Mobile Optimized
- Website Editor (CMS)
- Unique Design Choices
- Multi-Page Websites
- Unique Content
- AgentInsure® Lead Network
- Lead Capture Forms
- Multilingual
- Quarterly Updates
- Dedicated Website Consultant
- Local Reach
- Social Reach
- Performance Reviews
- Insurance Blog
- SSL Certificate





# EZLynx Consumer Quoting™

Turn online shoppers into clients with automated recording, tracking, and follow-up.

## Benefits



### Improve Customer Service

Every time you receive a new lead in EZLynx, the system will automatically create a task and send out a notification email.



### Stay Organized

Consumer contact details, risk information, and all quotes automatically populate in your EZLynx account for easy access.



### Gain New Insights

The activity report will give you an overview of your lead activity, including details about consumers that abandoned the process before submitting the form.



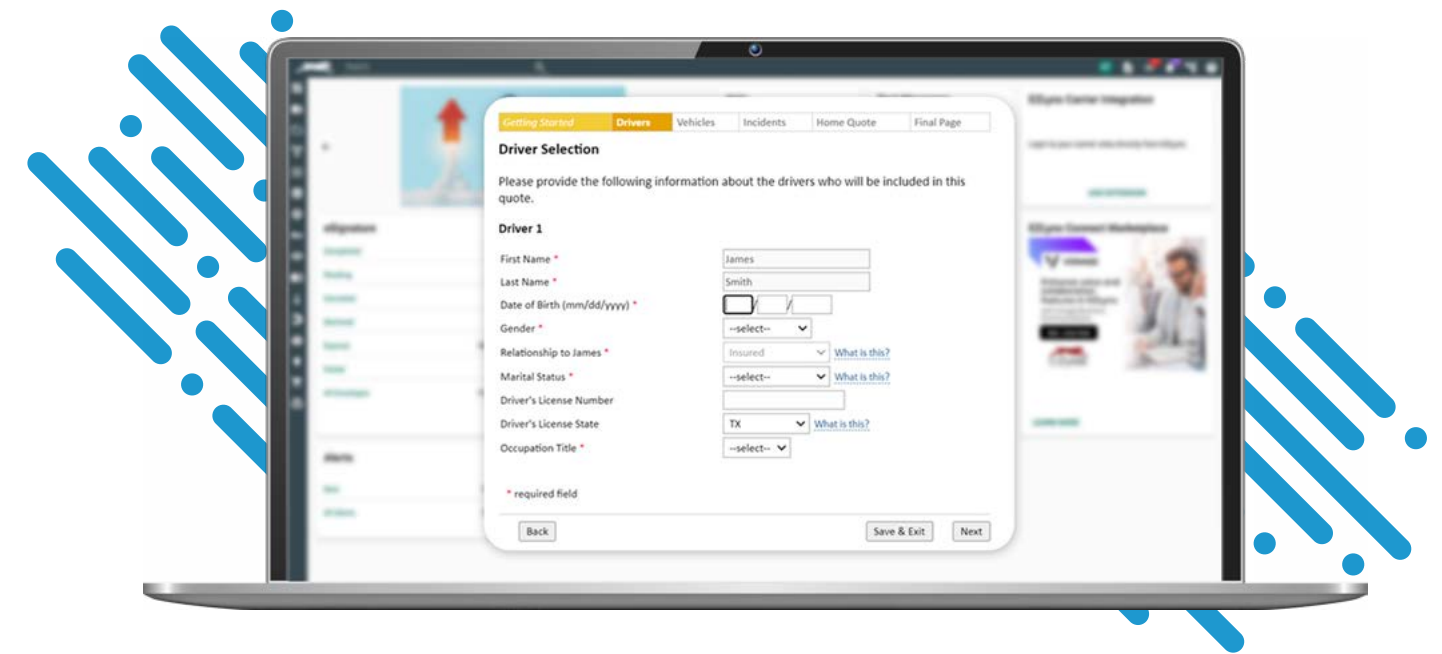
### Capture Every Single Lead

The lead portal makes sure you never miss out on a lead, even if they don't answer all the questions! You can also capture leads for other lines of business, such as Commercial, Health, and more.

3

## Get Online Insurance Quoting Software

Add a widget to your website that allows your customers to access quotes without contacting you directly, and keep track of the data entered.



## Features

- Live Quoting
- Mobile Quoting
- Enhanced Quoting
- Automated Drop-Off Campaigns
- Lead Portal
- Google Analytics® Access





# EZLynx Sales Center™

Grow your business by managing and gaining more visibility into your sales pipeline.

## Benefits



### Improved Pipeline Management

Assess your entire sales process to make informed decisions. Sales dashboards allow you to quickly see close ratios for producers and deal aging.



### Meet Goals

As a quote moves through the pipeline, the estimated value becomes more accurate, allowing you to forecast sales for month's end.



### Superior Sales Experience

No more need for cumbersome spreadsheets or multiple systems, which can result in lost opportunities.



### Maximize Your Bottom Line

Know each opportunity to target and the next task to close the deal. Your producers will know to focus on revenue-generating activities to maximize their time.

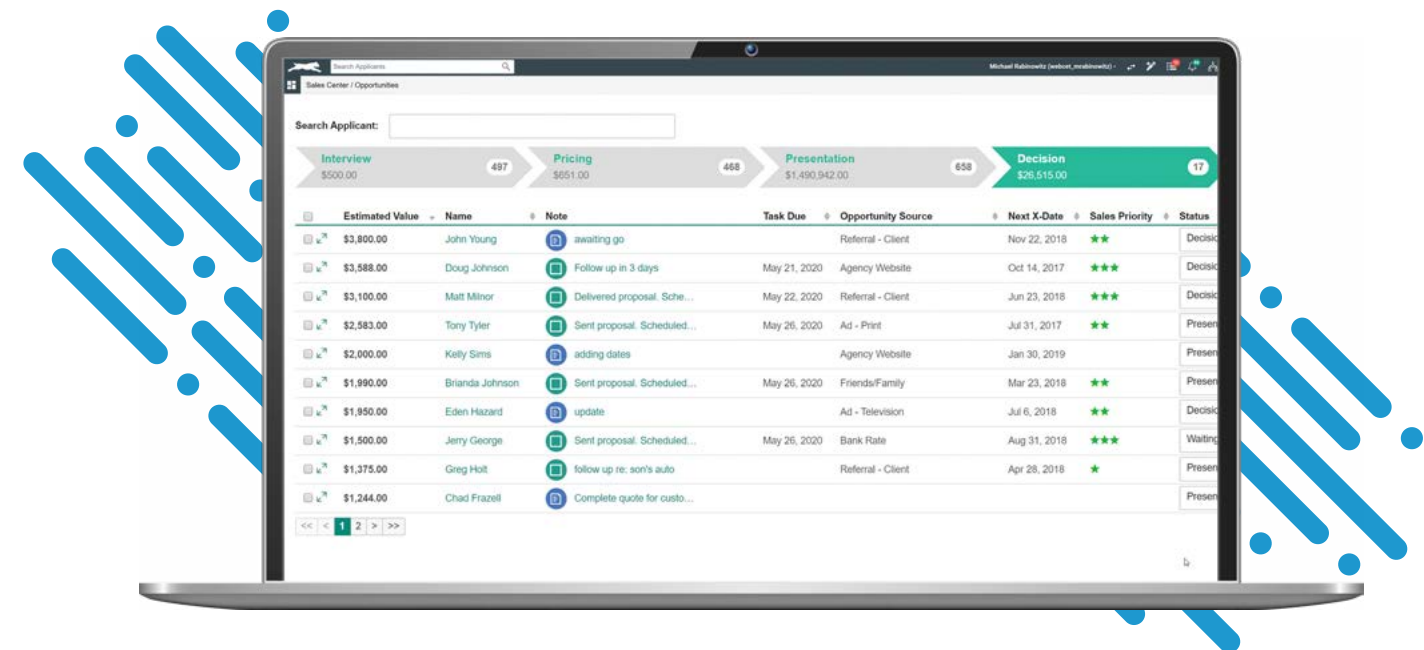


### Agency Insights®

Automatically generate potential prospects from your quote data and book of business. Recapture, win and cross-sell opportunities before the X-Date.

## 4 Get Online Insurance Quoting Software

Add a widget to your website that allows your customers to access quotes without contacting you directly, and keep track of the data entered.



## Features

- Pipeline Management
- Detailed Sales Tracking
- Prospect Import
- Automated X-Date Reminders
- Lead Tracking
- Mine Your Agency's Data
- Powerful Automation Through EZLynx Automation Center™





# EZLynx Rating Engine™

Quote in real time with an easy-to-use comparative rater for Auto, Home and Dwelling Fire.

## Benefits



### Instant Carrier Access

Instantly link to your carriers. We offer support with 330 carriers across the U.S.



### Quick & Easy Quoting

Defaults for EZLynx- and carrier-specific fields quicken the quoting process by providing and prefilling the fields that agents need and hiding those they don't.



### Protect Customers

Quickly deliver premium and coverage options via email with a secure connection for customer safety.



### Streamline Renewals

Customers can update risk information securely online prior to re-quoting to streamline the renewal process.



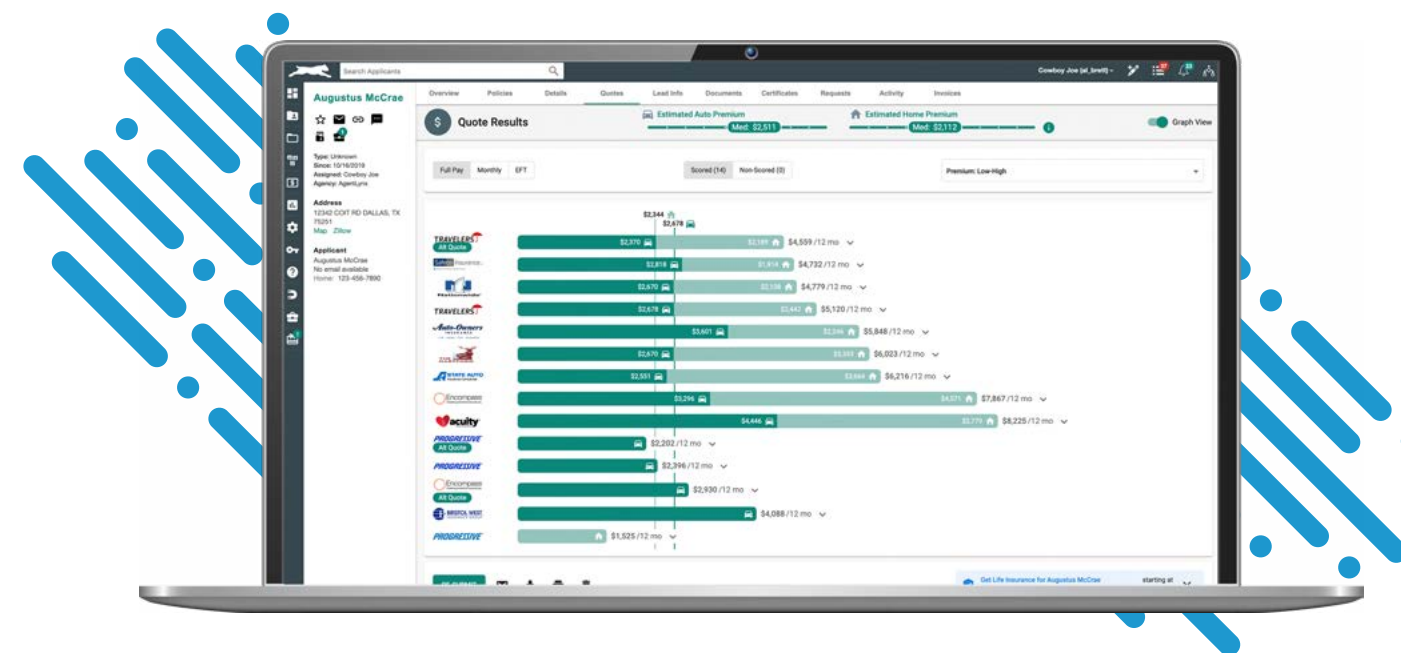
### Quote from Anywhere

Get real-time quotes on any mobile device—even on your phone!

5

## Generate Real-Time Quotes

Generate new quotes, finalize risk information to polish an existing quote, or requote to get the final premium for binding.



## Features

- Mobile Quoting
- Real-Time Quoting
- Intelligent Carrier Prefill
- Quote Templates
- Rate Estimator
- Graph View for Quote Results
- Google Maps® Integration
- EZLogin™ to Carrier
- Auto & Home Prefills\*

\* Per use fees may apply





# EZLynx Submission Center™

Optimize commercial submissions with a centralized hub to organize, track, and bind with ease.

## Benefits



### Focused Workflows

Guided workflows help the agent at every step of the process from submit to bind.



### Product & Appetite Guidance

NAICS lookup feature enables agents to check the appetite of a carrier before submitting.



### Submission History Tracking

Centralized dashboard provides a comprehensive overview of the submission activity.



### Underwriter Management

Keep track of carrier underwriter contacts and easily assign them to specific submissions.

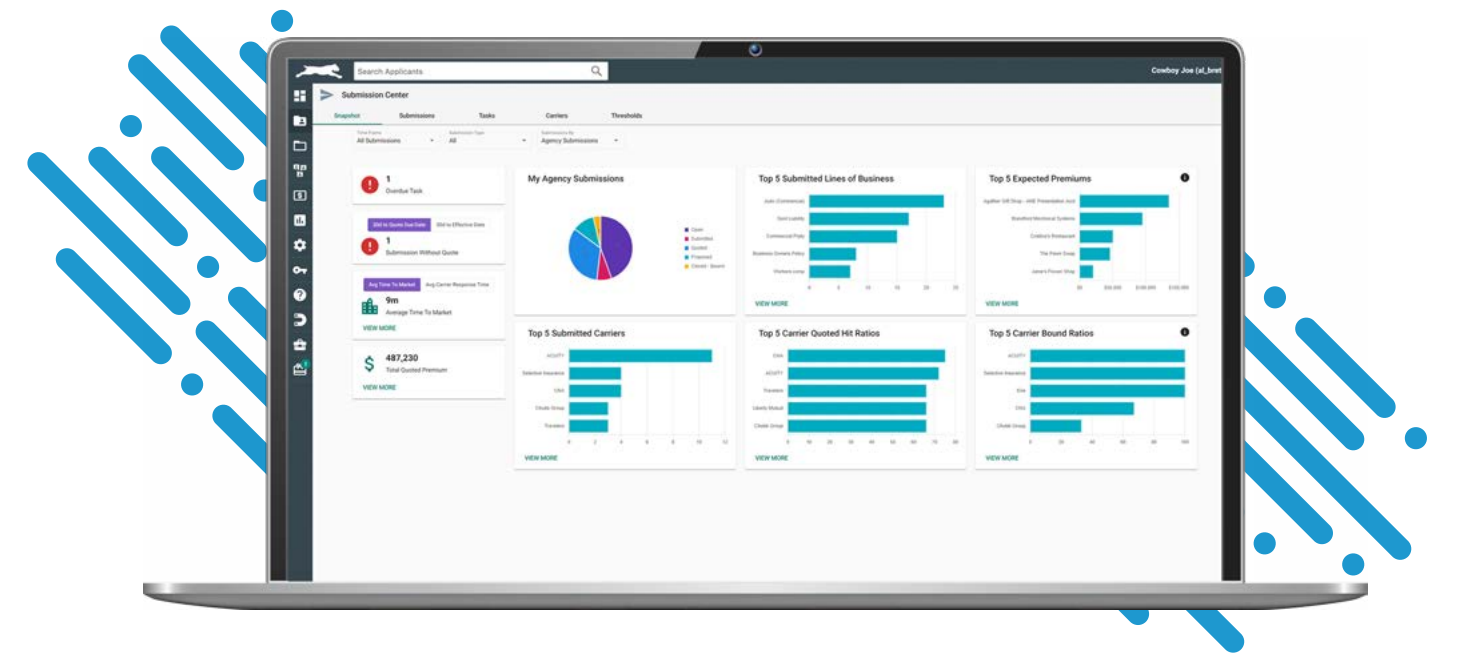


### Integrated Solution

Integration with EZLynx products, like EZLynx Sales Center™, means users have all the tools they need for submission success.

## 6 Smarter Commercial Submissions

Obtain product guidance, track carrier submissions, and grow your commercial book of business.

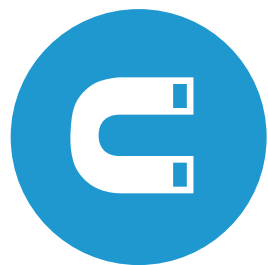


## Features

- Carrier Submission Tracking
- Underwriter Management Tool
- Carrier Integrations
- Intuitive Dashboard
- Product Recommendations
- Application Delivery
- Appetite Discovery
- Risk Data Lookups
- Integration to Tarmika™ for Real-Time Commercial Lines Quoting







# Retention Center<sup>®</sup>

Retain more premium volume with this patented tool to streamline your agency's retention process.

## Benefits



### Improve Customer Loyalty

Proactive renewal management that reinforces your value as a trusted advisor.



### Boost Productivity

Utilize new technology to conduct and manage the renewal process without increasing staff.



### Know When to Remarket

Predictive analytic models identify which clients are most at risk.



### Save Time

Instantly compare current and renewal policies to quickly and easily identify any changes in coverage or premium.



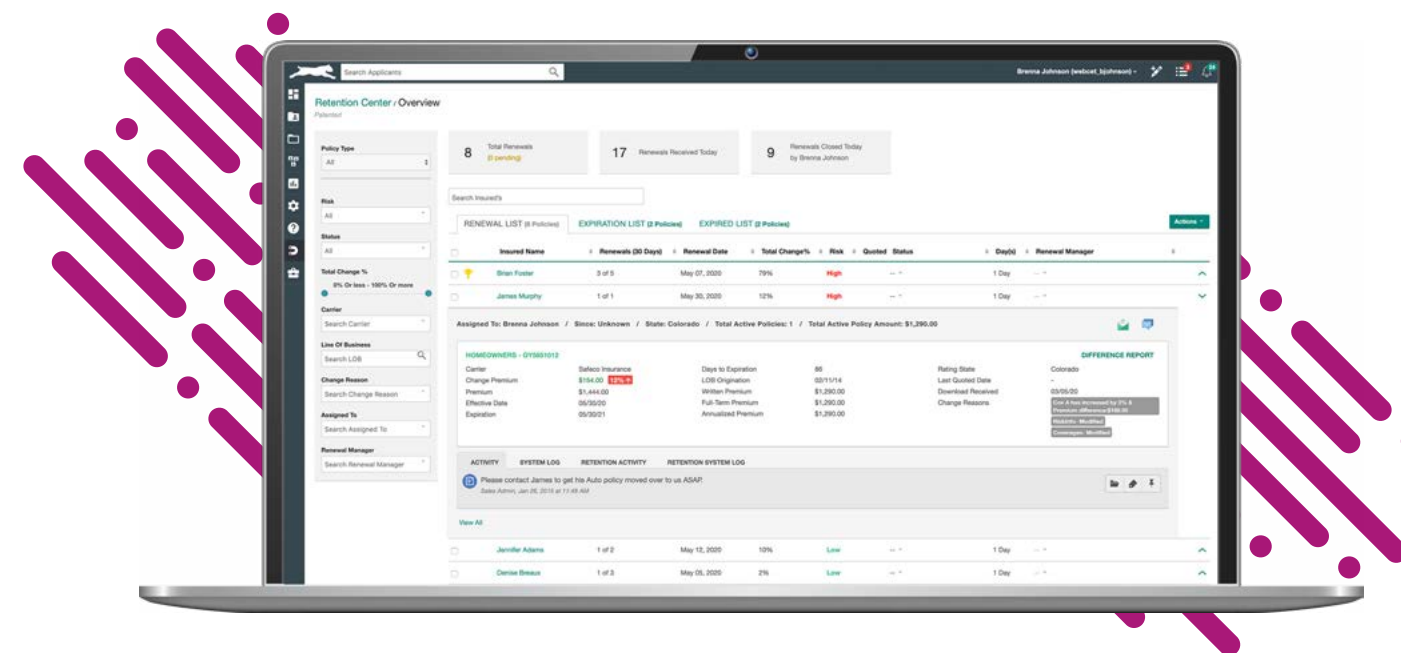
### Increase Your Bottom Line

Each additional point of retention corresponds to a specific dollar amount parallel to your agency's increase in profit.

## 7

# Focus On Your Retention Strategy

Know which customers are at risk, and proactively communicate to provide them with options.



## Features

- Predictive Analytic Risk Assessment
- Premium Change Summary
- Policy Comparison
- Renewal Notification
- Historical Premium Changes
- Commercial & Personal Lines
- Powerful Automation Through EZLynx Automation Center™





# EZLynx Agency Accounting™

Manage your finances with premium trust accounting for agencies of all sizes.

## Benefits



### Track Commissions

Track earned and paid commissions for both agency bill and direct bill policies, all in one place.



### Keep Your Premium Trust in Balance

Easily separate your earned commissions from premiums to help ensure your premium trust is balanced.



### Manage Receivables & Payables

Keep a tight handle on your A/R with the aging report. Never lose track of a payment with the one-step auto pay function.



### Follow the Audit Trail

Trust a full set of auditing capabilities—simple enough for novices, yet powerful enough for experienced accountants.



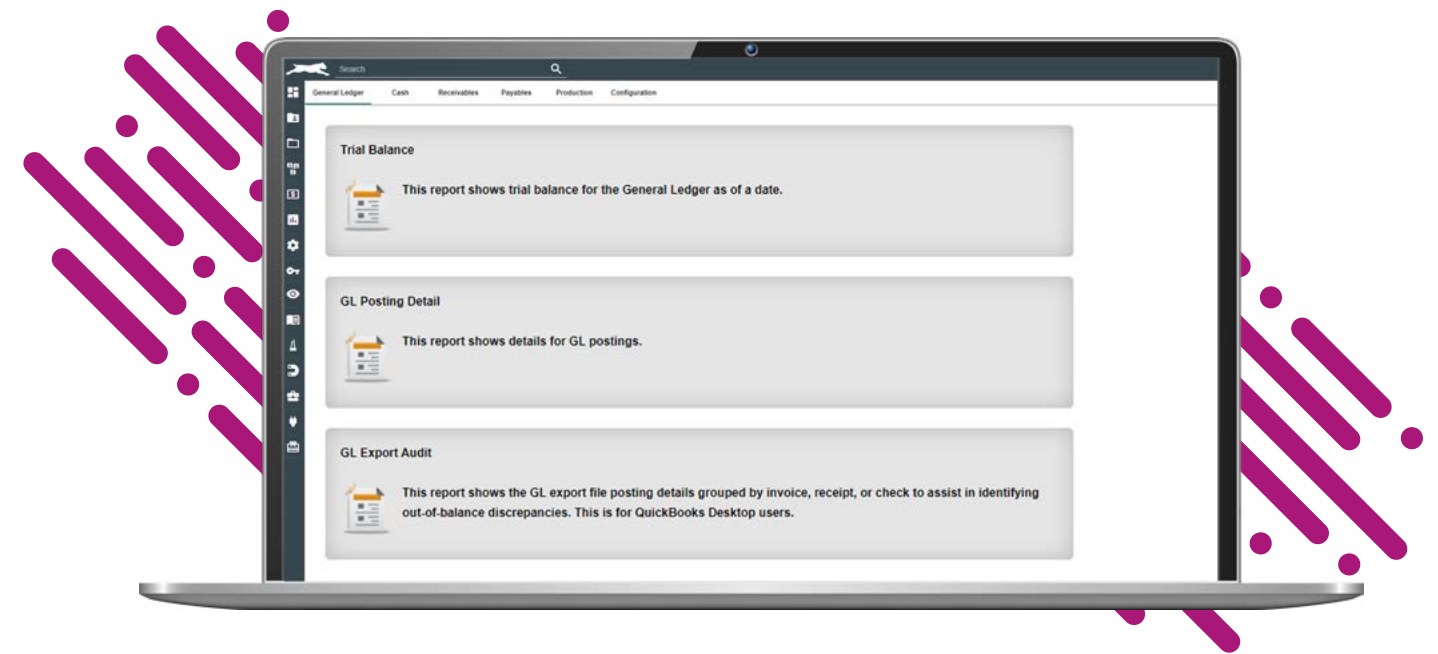
### Grow with Your Agency

EZLynx Agency Accounting™ can grow with you, supporting both the small agency and the large commercial agency with multiple branches.

## 8

## Never Lose Track of a Penny

Accurately track your income, receivables, and payables, all integrated with your management system.



## Features

- Invoicing
- Producer Commissions
- Accounts Receivable
- Company Payables
- QuickBooks® Integration
- Branch Accounting
- Transaction Log
- Automated Reconciliation with Applied Pay®





# EZLynx Communication Center™

Connect with your customers more effectively, and expand your marketing reach.

## Benefits



### Drive Sales & Grow Your Book

Leverage the power of reporting to define targeted and timely cross-sell email campaigns. Increase your policy per customer count.



### Improve Retention

Proactively communicate with clients to increase retention and improve the overall customer service experience.



### Build Loyalty

Show customers you care by setting date-sensitive delivery for holidays, birthdays, or policy terms.



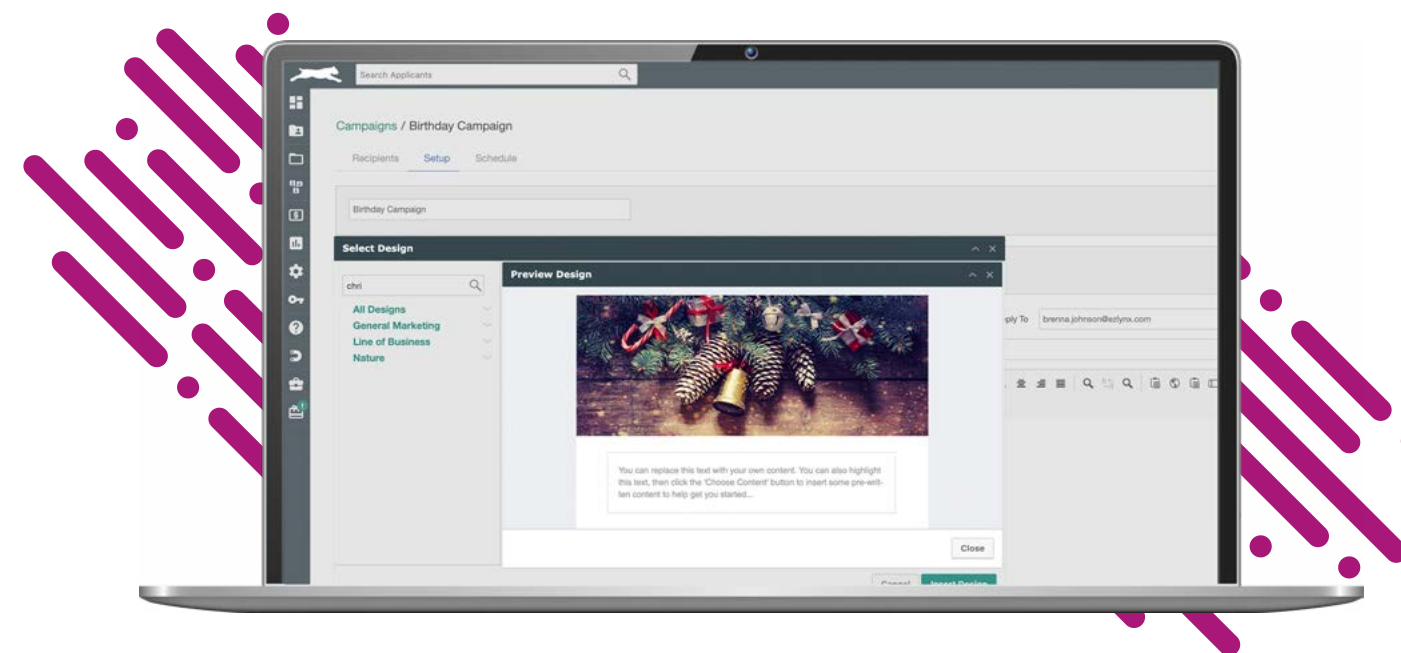
### Seamlessly Integrated

From postal mail, email, text messaging, and more, you'll be able to communicate with customers in the way that works best for them – all from within EZLynx.

## 9

## Communicate More Effectively

Stay in-touch and up-to-date with targeted and timely communications.



## Features

- Email Campaigns
- Text Messaging
- eSignature
- EZLynx® for Outlook® / Gmail®
- Postal Mail
- EZLynx Virtual Agent (EVA™)





# EZLynx Client Center™

Deliver superior customer service easily and securely all day, every day, from any device.

## Benefits



### Improve the Customer Experience

Customers can access policies and submit requests on mobile phones or from any internet-enabled device.



### Rapid Response Time

Activity notifications are instantly sent to agents when customers electronically request changes.



### Increase Productivity

Reducing general service requests frees time for agents to focus on larger items.



### Reduce E&O Exposure

Client activity and communication are logged in the agency's EZLynx system for quick access.

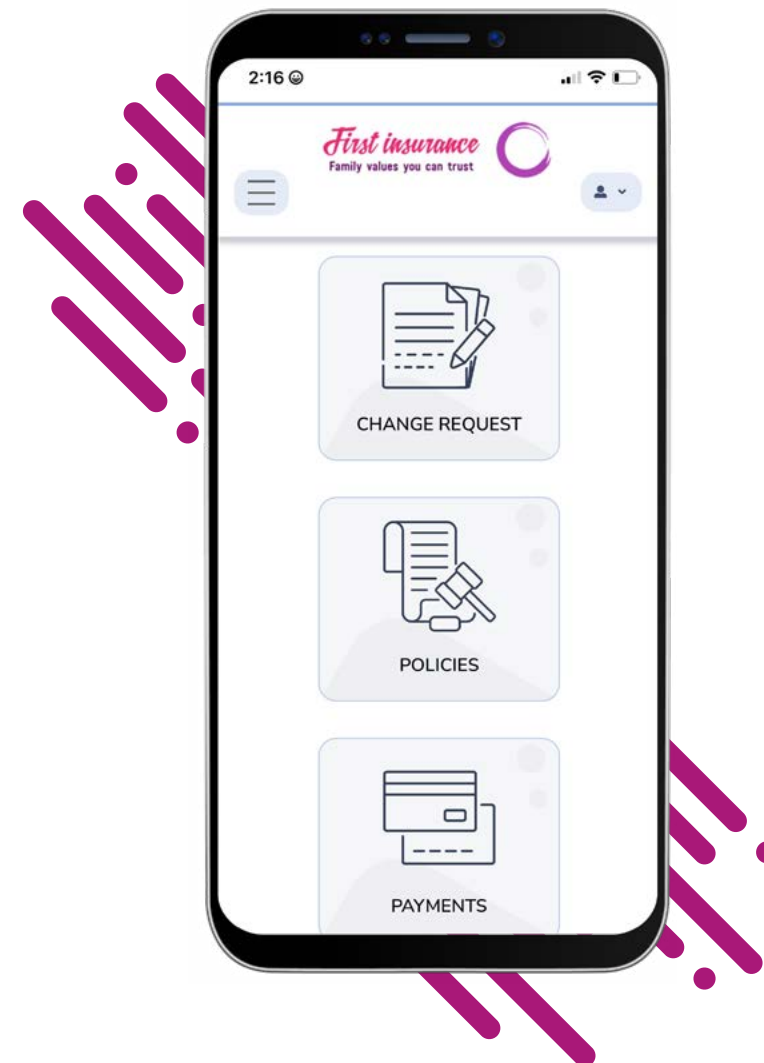


### Commercial Self-Service

Clients can generate certificates and share documents through this secure, always available online portal.

## 10 Help Customers & Boost Efficiency

Give customers 24/7/365 access to their policy documents and ID cards.



## Features

- Document Sharing
- Policy Change Requests
- ID Card Access
- View Policies
- Add Claims Information or Images
- Add Certificate Holders
- Generate Certificates
- Agency and Direct Bill Payments





# EZLynx Reporting & Analytics™

Get a 360° view of your agency and stay on track to reach its goals.

## Benefits



### KPIs at a Glance

Summary reports allow stakeholders to see key agency metrics clearly at any time.



### Effortless Reports

Automated reports delivered to your Inbox ensure all of the information needed to make your agency successful is at your fingertips.



### Access Information Quickly

Detail reports provide data with intuitive filters so you can create reports, like marketing lists for sales, in mere minutes.



### Increase Productivity

Save your filter settings and automatically have the data ready and waiting for you the next time that you need it.



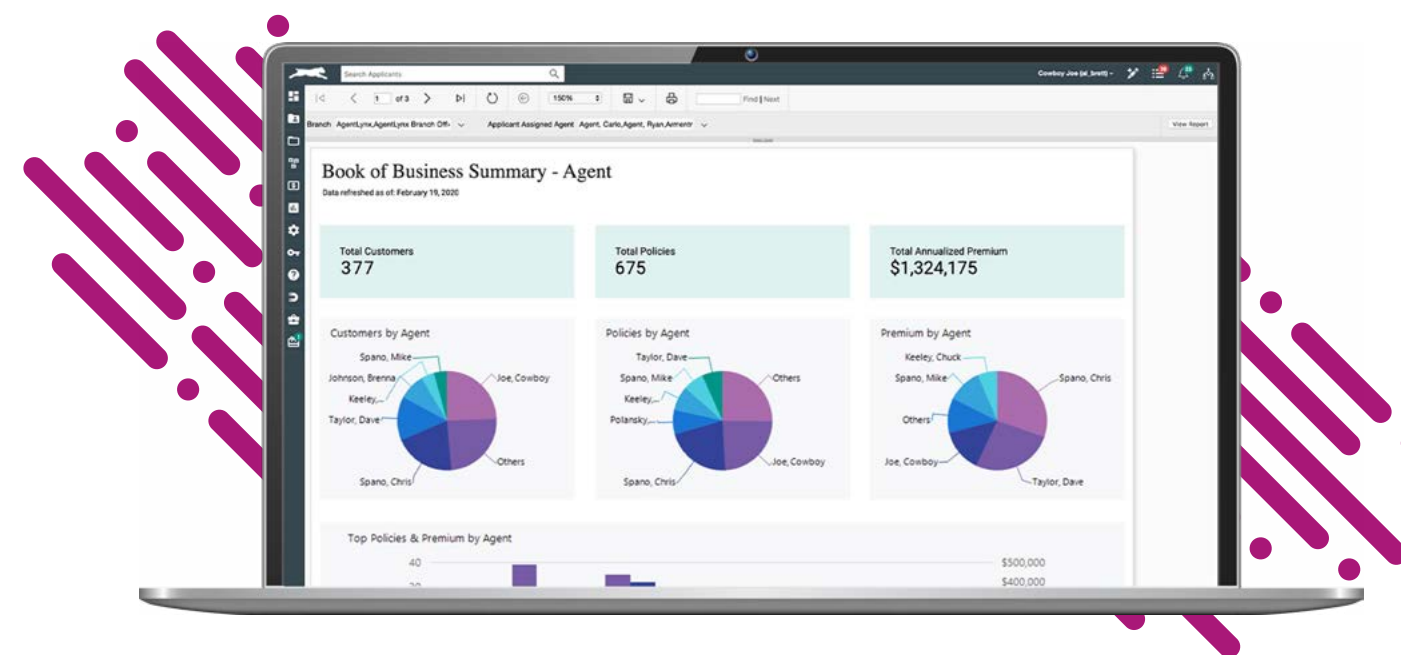
### Pixel-Perfect Reports

Pixel-perfect reports take the stress out of printing, sharing, and presenting KPIs. All-in-all, agencies can access accurate data faster and gain insights that were previously unattainable.

## 11

## Make Data-Driven Decisions

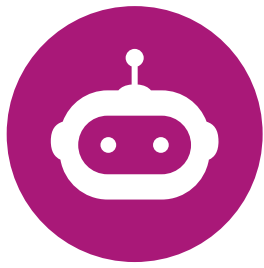
Get metrics and insights into your agency with tables, graphs, and more.



## Features

- Scheduled Reports
- Summary Reports
- Detail Reports
- Data Exports
- Peer Benchmarks





# EZLynx Automation Center™

Automate your agency's workflows to boost productivity and your bottom line.

## Benefits



### Automate Tasks

Automate task creation and email campaigns based on policy download transactions and other types of events in EZLynx.



### Save Time & Increase Productivity

Let EZLynx manage your agency's most repetitive and time-consuming tasks. Free up your staff to focus on more important, revenue-generating activities.



### Grow Your Business

Seize more opportunities to win back former customers and upsell existing clients.



### Improve Follow-Up

Make sure your staff is following best practices with every customer touchpoint.

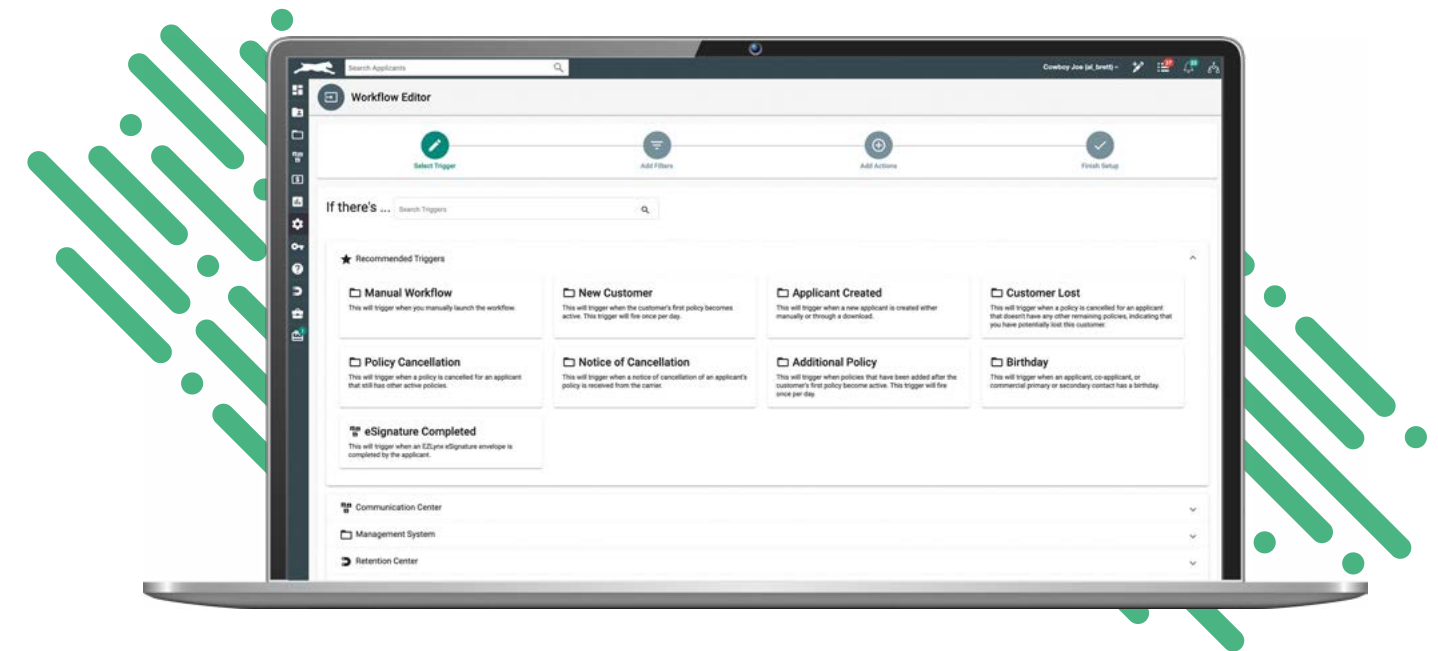


### Create Filters

Automation filters are available for all triggers, across a variety of conditions and criteria.

## 12 Perform Faster & More Effectively

Agency automation makes a more productive staff.



## Features

- Event-Based Automation Triggers
- Tailored Customer Touchpoints
- Conditional Rules
- Automatically Enable/Disable Triggers on Demand
- History Log
- Simple to Set Up
- Automatically Create Notes and Tasks, Send Emails, and More





# Applied Pay®

Simplify your Agency Bill Collections with our natively integrated Digital Processing Solution.

## Benefits



### Highest Pay Limits on Single TRX

Your larger clientele will experience first class service as they are able to make payments up to 1 million per transaction.



### Reduce Accounting with Automation

Payments received through Applied Pay will automatically create a receipt in the accounting area simplifying the accounting process.



### Feature Updates

At Applied Pay our goal is to become the logical choice for EZlynx users. To accomplish this we are releasing updates every 6 weeks to stay ahead of the competition and offer the most robust processing solution in the industry.



### Improved Customer Experience

By offering a modern, omni-channel payment experience, Applied Pay improves customer satisfaction and increases online payment adoption.

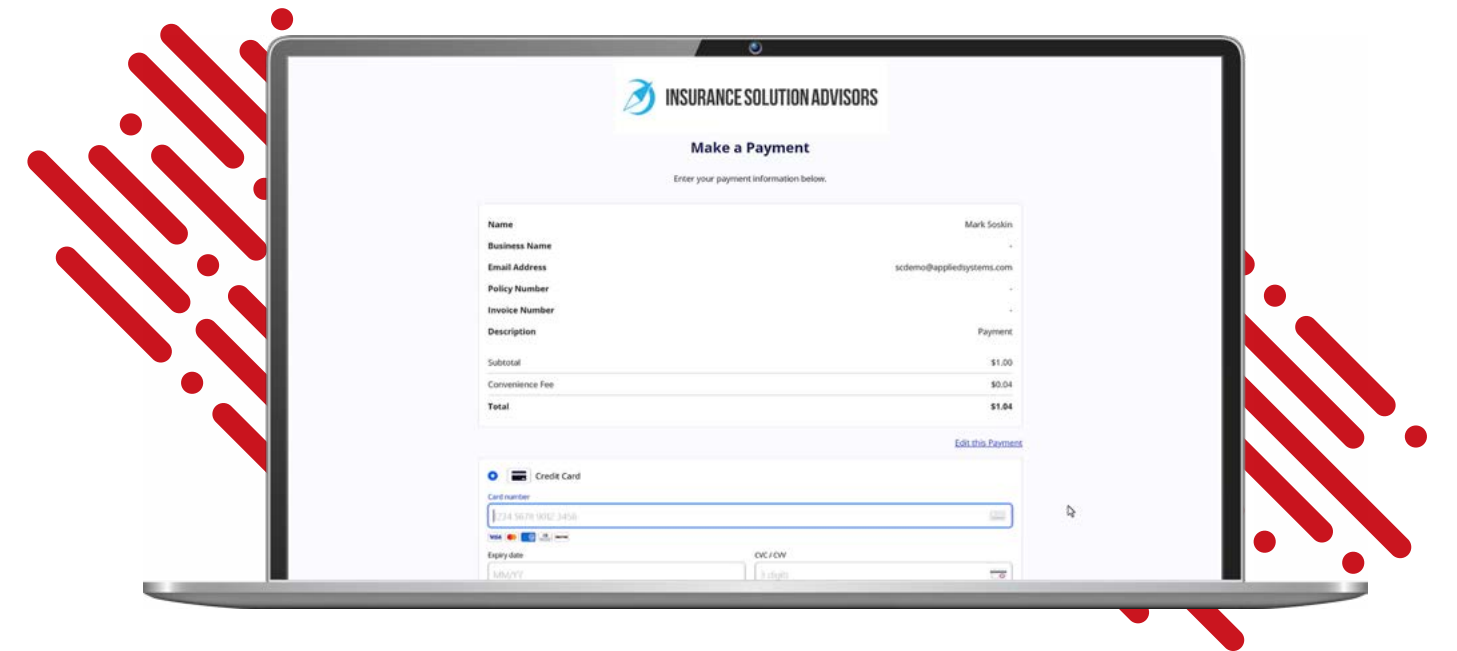


### Tier One Compliance

Applied Pay offers PCI DSS, the highest level of compliance and payment security to securely store, transmit, and process credit card information.

## 13 Improve Collections with Digital Payments

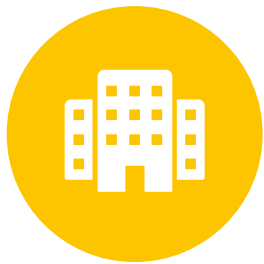
Improve your customer experience, reduce back-office tasks, and enhance security throughout the collection process.



## Features

- Accepts CC & ACH Payments
- Agency Branding
- PCI/NACHA Compliant
- Modern Checkout Experience
- Accounting Automation
- Instant Notifications
- BMS Integration
- ACH Verification
- Real-Time Transaction Visibility





# Tarmika™

Seamless quoting for small commercial business.

## Benefits



### Simplified Commercial Quoting Process

Integrated with EZLynx to prefill account and contact information into the Tarmika quote workflow to reduce duplicate data entry.



### Create Organizational Productivity

Collect data, find in-appetite markets and submit to markets all in one system to create a simpler, more connected commercial lines quoting experience.



### Grow Your Commercial Lines Business

Single data entry workflow provides the time savings you need to make working on small commercial policies profitable.



### Increased Connectivity

Access to 35+ commercial markets to automate the quoting process saves time from re-keying data into multiple systems.

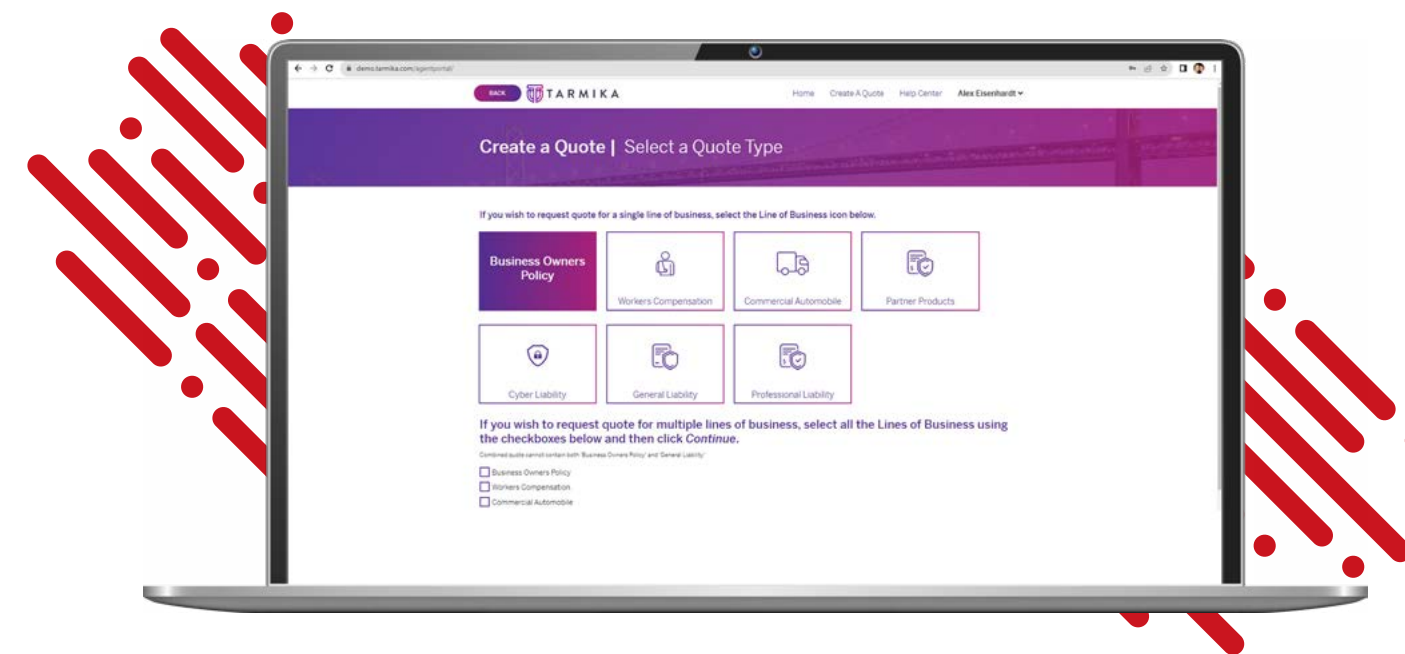


### Embedded Insurance Option

Direct-to-consumer, embedded insurance solution that enables the insured to submit quoting data to multiple insurers and receive bindable premiums, creating a simpler, more connected commercial lines quoting experience.

## 14 Quote More Easily

Streamline the quoting process and quote multiple lines of business with multiple carriers using our single-entry solution.



## Supported Lines of Business:

- Business Owner's Policy
- Commercial Auto
- Cyber Liability
- Excess & Surplus Lines
- General Liability
- Professional Liability
- Umbrella
- Workers' Compensation

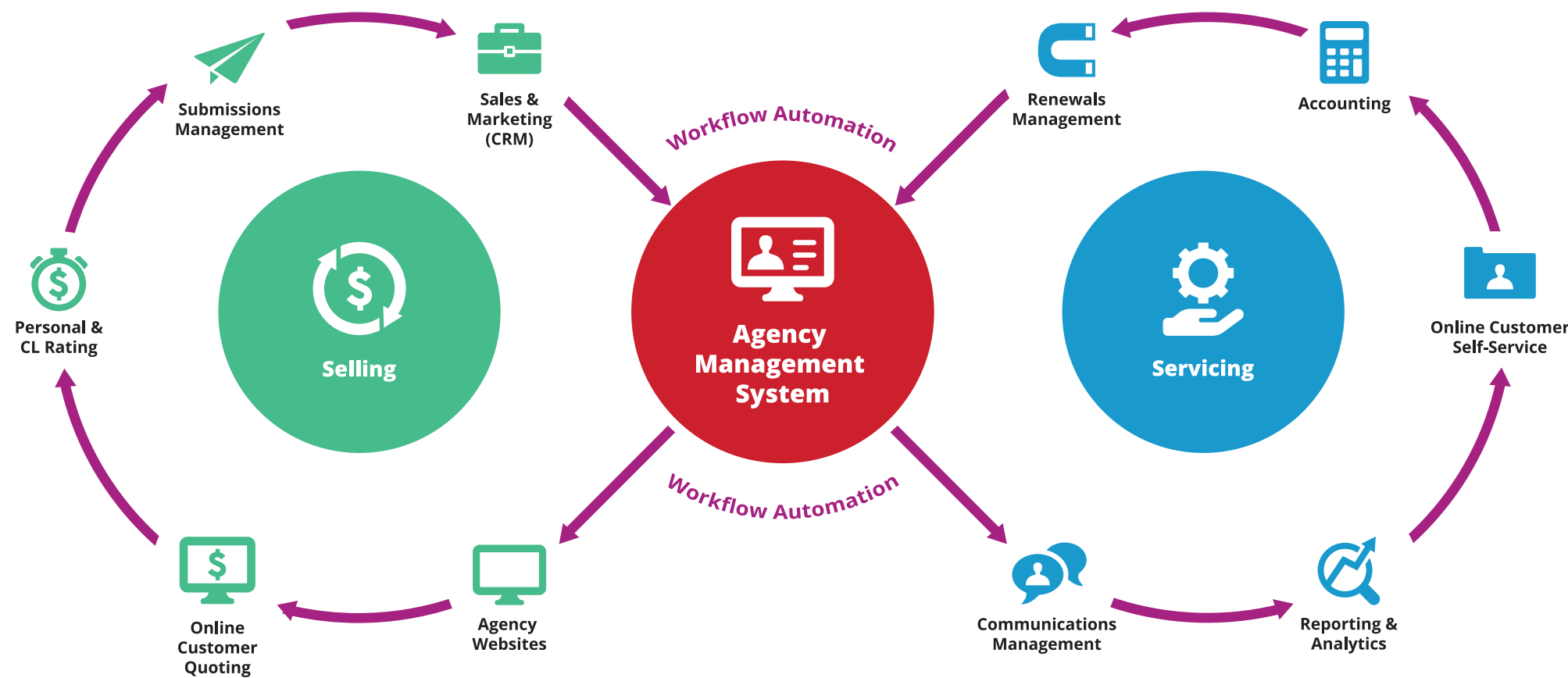




# EZLynx All-In-One Platform

for the Complete Customer Lifecycle

- Websites**
  - Insurance-Specific Designs
  - Mobile Responsive
  - Capture Quality Leads
- Online Customer Quoting**
  - Deliver Multiple, Instant Quotes!
  - Capture Leads for Any LOB
  - Mobile Device Optimized
- Personal & CL Rating**
  - Industry Leading Technology
  - Driver, Vehicle & Home Pre-Fills
  - Time-Saving Quote Templates
  - 330 Carriers in 48 States
- Submissions Management**
  - Commercial Submissions Workflow
  - Product & Appetite Guidance
  - Underwriter Management
- Sales & Marketing (CRM)**
  - Streamline the Sales Process
  - Data Mine Quote History & Book of Business
  - Manage Your Prospects
  - Sales Performance Metrics



- Agency Management System**
  - All Lines Supported
  - Matched Policy Downloads
  - Multi-Tasking with Agency Workspace
  - Policy Sync and Policy Compare

- Communications Management**
  - Email Campaigns
  - Text Messaging
  - EZLynx eSignature™
  - Outlook® Integration
- Reporting & Analytics**
  - Automated Reports
  - KPIs at a Glance
  - Make Data-Driven Decisions
  - Boost Agency Performance
- Online Customer Self-Service**
  - 24/7/365 Customer Self-Service
  - Customer-Generated ID Cards
  - Certificate Self-Generation
- Accounting**
  - Track Commissions
  - 360° View of Profitability
  - Manage Receivables & Payables
- Renewals Management**
  - Streamline the Renewal Process
  - Boost Revenue
  - Expedite Remarketing
  - Focused, Proactive Strategy



# Integrating Through EZLynx Connect®

**EZLynx Connect** helps agencies scale through innovative hardware and software solutions. This marketplace provides third-party vendors with an opportunity to distribute their products and services directly within the EZLynx platform.

We've opened the EZLynx framework and invited carriers and vendors to work side-by-side with our technologists to innovate and integrate solutions that better the agency workflow.

A key ingredient for our "Agency-in-the-Cloud" strategy, **EZLynx Connect** means opening up new avenues for growth, productivity and profitability by way of trusted **vendor partners**.

## Built-In Value

These partnerships mean even greater value from the EZLynx you know and love. Vendor integrations strengthen your business—making it more productive and efficient in very targeted ways. We all win together!





Agency Websites | Consumer Quoting | Sales Center | Rating Engine  
Management System | Submission Center | Accounting | Client Center | Communication Center  
Automation Center | Retention Center | Reporting & Analytics | Applied Pay | Tarmika

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