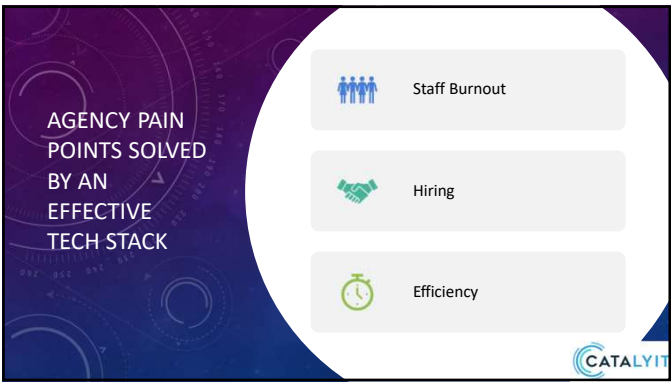
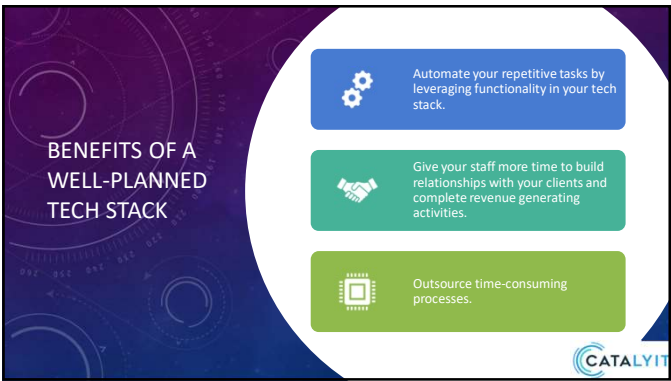




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3

WHAT IS A TECH STACK


A "tech stack" refers to the combination of software tools and technologies that an insurance agency uses to manage its operations. This includes everything from customer relationship management (CRM) systems, agency management systems (AMS), communication platforms, quoting tools, to data analytics software. Together, these tools help the agency streamline its workflows, improve client service, and run more efficiently.



4

How many technology platforms does your agency use?

Agency Size by Total Revenue	Avg. Number of Tech Platforms Used
Less than \$500K	5.7
\$500K to \$1MM	6.6
\$1MM to \$2MM	7.8
\$2MM to \$3MM	9.0
\$3MM to \$5MM	9.2
More than \$5MM	11.9



5

TECH STACK FUNDAMENTALS


MANAGEMENT SYSTEM


CRM


WEBSITE


FORM BUILDER


DATA INTAKE


WORKFLOW AUTOMATION


VOIP



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TECH STACK CONSIDERATIONS

Select programs that fit your agency processes*

Are emails, calls and texts automatically documented?

Does your management system integrate with your CRM?

Who is your average client? Who is your ideal client?

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Agencies using an agency management system

A DEEPER DIVE: Most Used by Agency Revenue (2024 vs. 2023)

Total Revenue	Top 3 Platforms Used*		
Less than \$500K	EZLynx (Applied): 19% <small>(2023: 29%)</small>	AMS360 (Vertafore): 13% <small>(2023: 14%)</small>	HawkSoft: 10% <small>(2023: 17%)</small>
\$500K to \$1MM	EZLynx (Applied): 19% <small>(2023: 20%)</small>	AMS360 (Vertafore): 15% <small>(2023: 17%)</small>	HawkSoft: 12% <small>(2023: 6%)</small>
\$1MM to \$2MM	Applied Epic: 22% <small>(2023: 26%)</small>	AMS360 (Vertafore): 20% <small>(2023: 27%)</small>	Applied TAM: 12% <small>(2023: 9%)</small>
\$2MM to \$3MM	Applied Epic: 34% <small>(2023: 40%)</small>	AMS360 (Vertafore): 28% <small>(2023: 34%)</small>	HawkSoft: 12% <small>(2023: 10%)</small>
\$3MM to \$5MM	Applied Epic: 45% <small>(2023: 53%)</small>	AMS360 (Vertafore): 20% <small>(2023: 22%)</small>	HawkSoft: 10% <small>(2023: 6%)</small>
More than \$5MM	Applied Epic: 46% <small>(2023: 52%)</small>	AMS360 (Vertafore): 25% <small>(2023: 34%)</small>	HawkSoft: 7% <small>(2023: 10%)</small>

*Left to right: most used, second-most used, and third-most used

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Agencies using a CRM system

Yes
28%

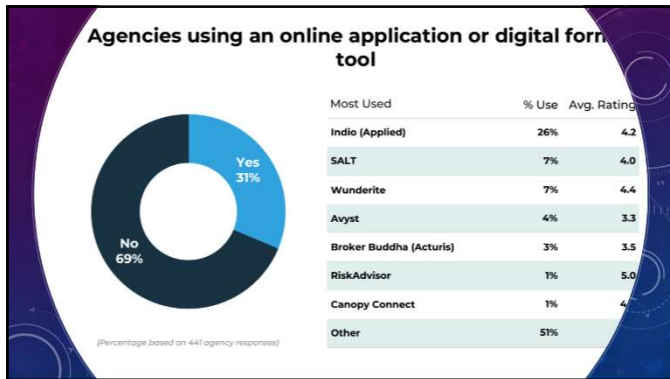
No
72%

Most Used

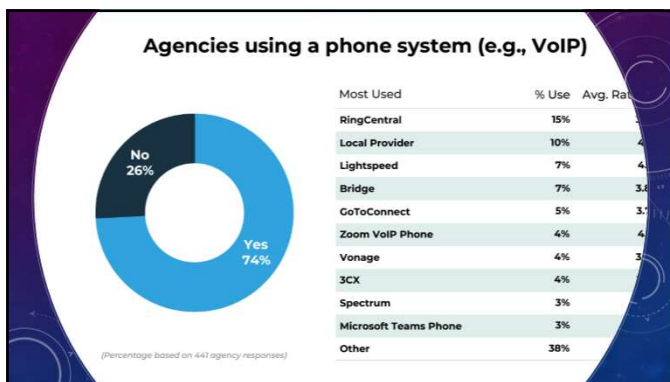
Most Used	% Use	Avg. Rating
AgencyZoom (Vertafore)	25%	4.5
Salesforce	12%	3.5
ClientCircle	9%	3.5
Levitare	9%	4.5
Agency Revolution	8%	4.5
InsuredMine	6%	3.5
HubSpot	3%	3.5
Constant Contact	2%	5.0
InsurGrid	1%	5.0
b atomicl	1%	5.0
Better Agency	1%	5.0
Other	24%	

(Percentage based on 447 agency responses)

9



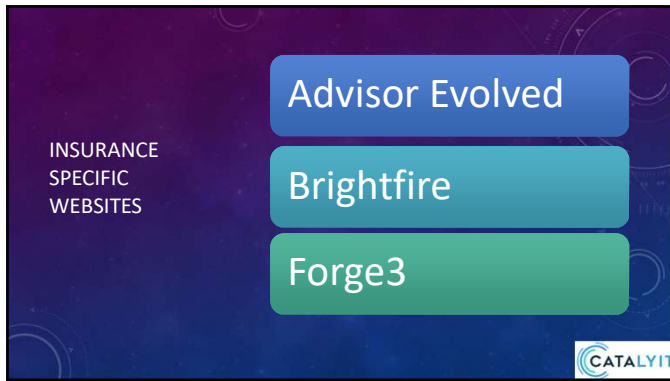
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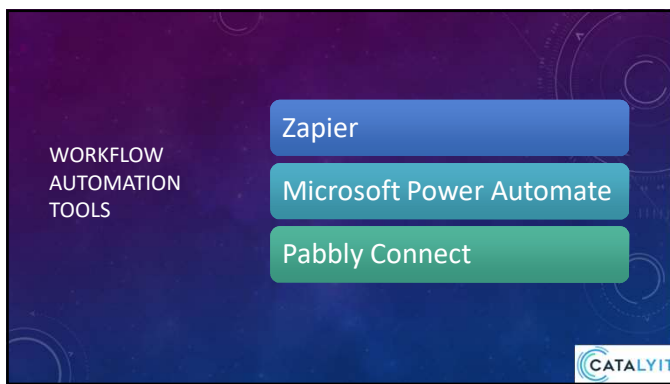
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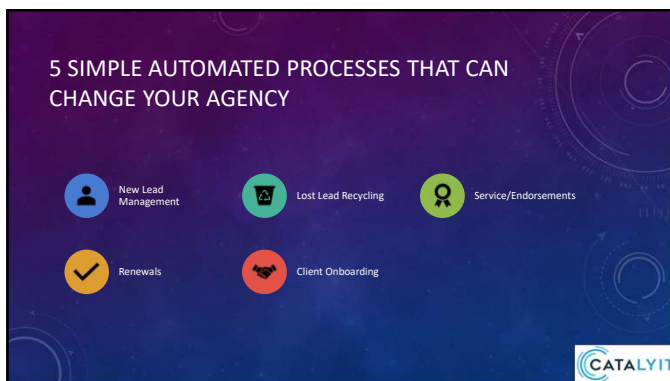
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AUTOMATION (PROCESS OUTSOURCING)

Automation refers to technology that automates repetitive, rule-based tasks within software applications, eliminating the need for human intervention.

- Increased Efficiency: Automates tasks like data entry, task management, and communication.
- Cost Reduction: Lowers labor costs by reducing manual work.
- Improved Accuracy: Minimizes human failure to complete routine processes.
- Scalability: Easily handles increased workloads without additional staff.
- Faster Processing: Accelerates task completion, leading to improved client satisfaction.



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FRONT DOOR THEORY

Every process has a "Front Door" where the workflow begins

Leads Service Renewals



Automation is linear and information needs to flow in one direction



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LEAD AUTOMATION



Manually enter leads into one program and they are automatically added to all programs

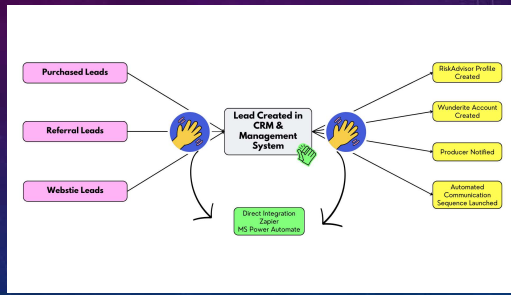


Paid leads are prospected by your CRM instantly instead of waiting for someone to see an email and enter lead information manually



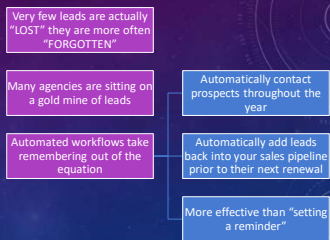
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NEW LEAD AUTOMATION



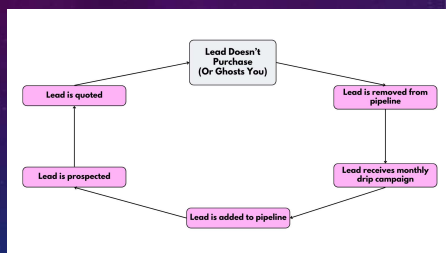
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LOST LEAD FOLLOW UP



20

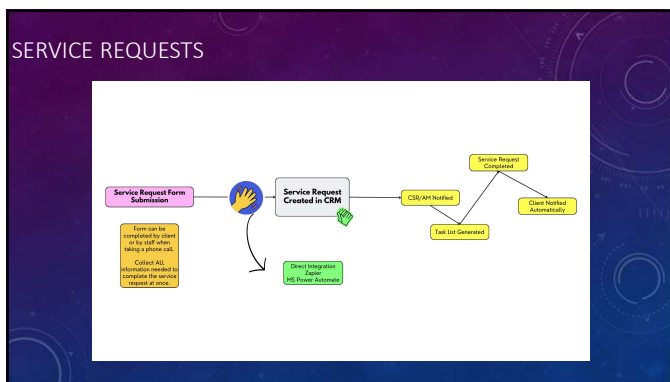
LOST LEAD RECYCLING



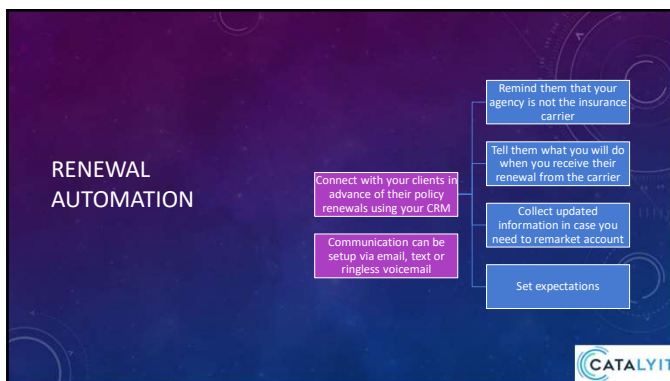
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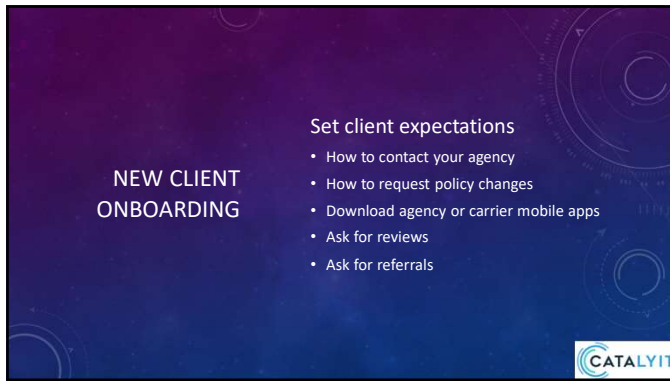
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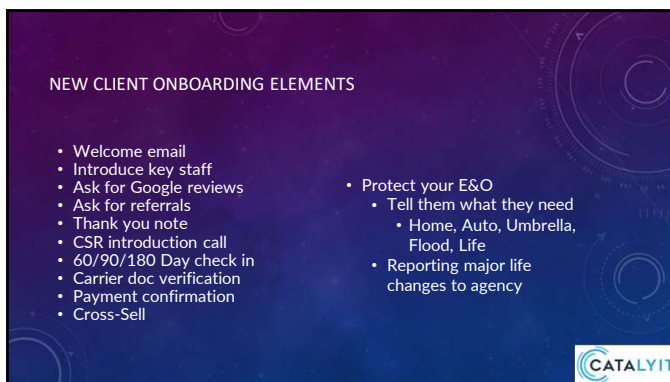
NEW CLIENT ONBOARDING

Set client expectations

- How to contact your agency
- How to request policy changes
- Download agency or carrier mobile apps
- Ask for reviews
- Ask for referrals

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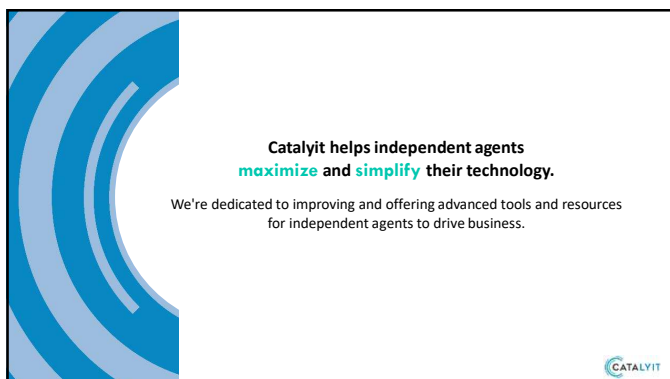


NEW CLIENT ONBOARDING ELEMENTS

- Welcome email
- Introduce key staff
- Ask for Google reviews
- Ask for referrals
- Thank you note
- CSR introduction call
- 60/90/180 Day check in
- Carrier doc verification
- Payment confirmation
- Cross-Sell
- Protect your E&O
 - Tell them what they need
 - Home, Auto, Umbrella, Flood, Life
 - Reporting major life changes to agency

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Catalyt helps independent agents
maximize and simplify their technology.

We're dedicated to improving and offering advanced tools and resources for independent agents to drive business.

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27

Agency Tech Assessment

Navigating tech can feel overwhelming, right?

We get it. Keeping up with your agency's tech tools while serving customers and managing an agency can be a tall order.


Enter Catalyit's Tech Assessment 2.0

Think of it as a pulse check on your tech resources.

Why it works:


- You get a clear picture of where you're shining and where there's room to grow.
- Completed it before? Fantastic! Retake it. Track how you've grown with our newest assessment, which we just released.

30-minutes FREE consulting with each Tech Assessment!



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The Catalyit Success Journey™




Baseline
Building a strong foundation

Better
Building stronger structures


Best
Ranked in Top 25%

Beyond
Eager adoption of new trends




29

28 Guides & Reviews Pages Now Featured



101 Weston Labs
101 Weston Labs is the first InsurTech accelerator for the independent channel, helping these startups bring their products to market so they can change the insurance industry.


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Generative AI
While generative AI can never replace the human touch, it offers many practical uses that can enhance your ability to communicate, advise, and serve clients effectively.

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Unlocked for a limited time



30

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