

Independent Agency 4.0

Digital Vendors and Resources:

As stated in the opening of this book, this is not a how-to, nor is it an endorsement of any one vendor. However, in the spirit of helping agents start to define their plan, I have provided a partial list of vendors. This is a rapidly evolving market, so please know that this is an incomplete or evolving list.

Resources:

- Insurance Agency 4.0 Resource Documents: www.mattmasiello.com/IA40
- Safeco/Liberty Mutual Agent for the Future: <https://www.agentforthefuture.com/>
- Big I Agent Council for Technology (ACT): <https://www.independentagent.com/ACT>
- FCC Cyber Checklist for Small Business: <https://www.fcc.gov/general/cybersecurity-small-business>

Agency Management Systems

- EZlynx – www.ezlynx.com
- Vertafore – www.vertafore.com
- Applied – www.applied.com
- Hawksoft – www.hawksoft.com
- Agency Matrix – www.agencymatrix.com
- Quikfuzion – www.quikfuzion.com/

Digital Marketing/Marketing Automation Vendors

- Advisor Evolved – www.advisorevolved.com
- Active Campaign – www.activecampaign.com
- Agency Revolution – www.agencyrevolution.com
- Agency Zoom – www.agencyzoom.com
- BrightFire – www.inswebsites.com
- Confluency Solutions – www.confluencysolutions.com
- Forge3 – www.forge3.com
- HubSpot – www.hubspot.com
- Infusionsoft – www.keap.com/infusionsoft
- Rocket Referrals - www.rocketreferrals.com
- Zywave – www.zywave.com
- Bridge – www.bridge.insure.com

Video Platforms (recording or conferencing)

- BombBomb – www.bombbomb.com
- Go to Meeting – www.logmeininc.com
- Loom – www.loom.com

- Zoom – www.zoom.com
- Advisor Evolved - www.advisorevolved.com

Appetite Guides

- Ask Kodiak – www.askkodiak.com
- RoughNotes-Pro - <http://roughnotes.com/products/products-example/>

eSignatures

- FormStack Sign – www.insuresign.com
- Right Signature – www.rightsignature.com
- DocuSign: www.docusign.com

Service Providers

- Agency Administrators – www.agencyadministrators.com
- Virtual Insurance Pro – www.vinsurancepro.com
- eDesk – www.edesk.io
- Applied CSR24 - <https://www1.appliedsystems.com/en-us/solutions/for-agents/mobility/applied-csr24/>
- Cover Desk – www.coverdesk.com

Electronic Payments

- ePay Policy - www.epaypolicy.com
- TranzPay –<https://www.tranzpay.com/>
- ZifflePay - www.zifflepay.com

Mobile App

- Insurance Agent App – www.insuranceagentapp.com

VOIP Phone Systems

- Lightspeed Voice – www.lightspeedvoice.com
- Ring Central – www.ringcentral.com