



AgencySmart has been helping brokers and general agents manage their business since 1999.

Our comprehensive cloud-based CRM solution is designed to let you have all your data on the go - on your laptop, tablet or smartphone. You can track client and prospect renewals, track service issues, enter and distribute commissions and a whole lot more with AgencySmart.

Never Lose Track of Your Clients

AgencySmart shows you which client and/or prospect renewals are coming up, what clients are in the process of quoting or underwriting, which clients are not paying their premiums, which claim issues need to be addressed immediately.

Built-in Small Group Quoting Engine*

AgencySmart includes a sophisticated yet easy to use quoting and renewal engine. Generate presentation-ready single, dual and even triple option proposals with ease. Generate proposals with employee contribution strategies that include fixed dollar, percentage of premium and/or solve using a budget. Create presentations with member-level-rates, 4 tier average rates, or composite rates.

Comprehensive "All-in-one" Package

AgencySmart combines several modules into one package, so you don't have to enter the same information in several different places. In addition to keeping records of your existing clients, the system allows you to keep track of prospects, additional contacts (advisors, GA's, sub-producers, etc.), commissions, customer service issues, your CSRs performance, and many others.

Access From Anywhere

With AgencySmart you can work from anywhere in the world! You don't have to be in the office to use the system--you can access it from your house, or hotel room while you are on a business trip--all you need is an Internet connection.

Reduce Overhead

AgencySmart facilitates the flow of information and reduces the amount of paperwork.

***You already work hard...
Its time to work smart...Agency Smart!***



Contact us at: 973-852-0700 or on the web: www.AgencySmart.com

* Quote engine not available in all states.