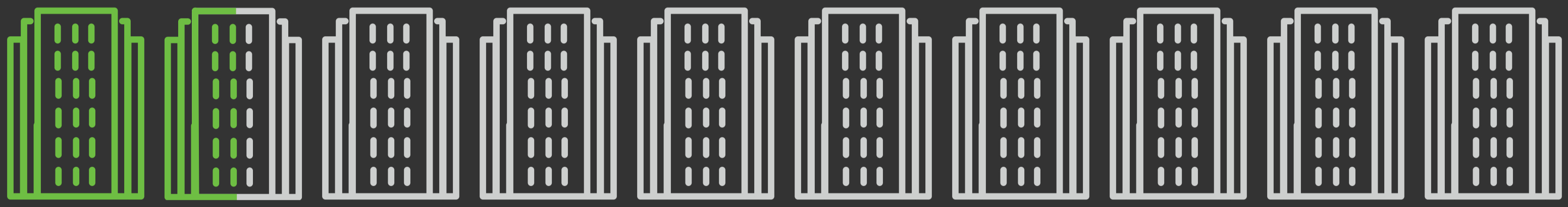


STILL USING EXCEL? HERE'S WHY YOU SHOULDN'T

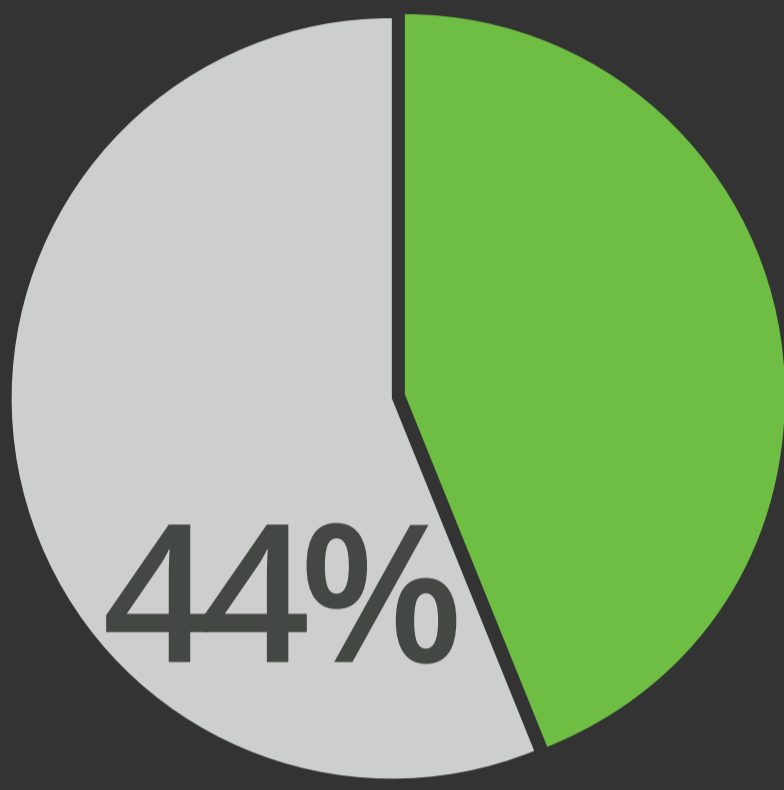


IS EXCEL STILL RELEVANT IN THE INSURANCE WORLD?

15% of insurance agencies still use Excel spreadsheets to manage their book-of-business¹



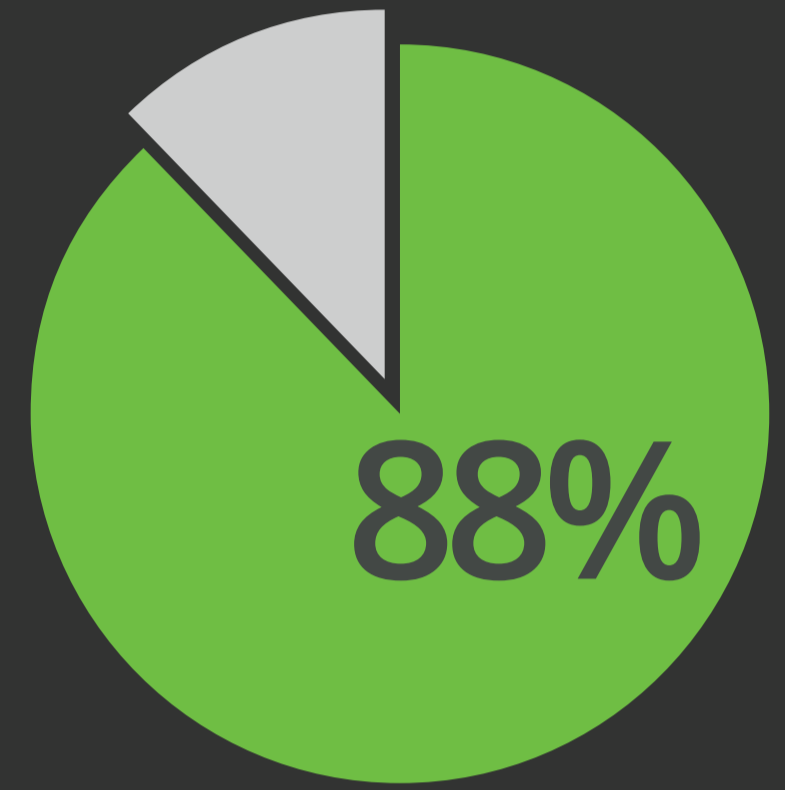
IS EXCEL EFFECTIVE FOR INSURANCE AGENTS?



of people grapple with multiple and inconsistent spreadsheets²



are spent each month consolidating, modifying, and correcting³



of Excel spreadsheets contain errors⁴

DISADVANTAGES OF EXCEL SPREADSHEETS

- They're vulnerable to fraud
- They're filled with errors
- They're difficult to troubleshoot
- They're rarely compliant
- They're not agile
- They're not built for collaborative work
- They're hard to consolidate
- They require manual back-up
- They're not scalable
- They're time-consuming

WHAT CAN I DO?

An Agency Management System like AgencyBloc can:

- Manage client, prospect, agent, policy, and carrier data
- Process, track, split, and project commissions
- Give insight into your agency's health with data analytics
- Automate client, prospect, and internal communication
- Automate sales follow-ups and task creation



Did you know?

You can save 40% of your time when you upgrade to an Agency Management System (AMS) from Excel.⁵

SOURCES

- AgencyBloc: "[eBook] Insurance Agency Technology in 2017: Database management, commissions processing, and digital marketing"
- TechTarget: "Top five dangers of using spreadsheets in finance"
- TechTarget: "Top five dangers of using spreadsheets in finance"
- MarketWatch: "88% of spreadsheets have errors"
- Cornerstone Software: "5 reasons to break out of your commission spreadsheet cells"