AUTOMATION CENTER 🤖

PERFORM FASTER & MORE EFFECTIVELY

Keep your agency focused on finding and closing new client opportunities.

BENEFITS

Focus on High-Value Activities

Agency automation frees up the time of the entire agency staff, allowing them to focus on higher value activities like identifying new client opportunities, cross-selling, and closing new business.

Offload Repeatable Tasks

Leverage technology to perform the day-to-day tasks that would otherwise divert your agency's attention away from growing and retaining its book of business.

Ensure Best Practices

You know how to stay in front of your prospects and provide your clients with the level of attention they deserve. Automation Center ensures these best practices are followed the same way, every time.

Grow Your Business

Because Automation Center never sleeps, you will never miss an opportunity to win back a former customer or to upsell an existing client.

EZLynx

AUTOMATION CENTER

FEATURES

Use this powerful add-on to EZLynx Management System to automatically create notes and tasks, send emails, and more.

» **Leverage Rules-Based Templates**

Simply create a new automation rule using one of our templates, configure what should happen when the rule is triggered, and then let EZLynx take care of the rest.

Automation Center features pre-built automation templates for:

- *New Customer*
- *Additional Policy*
- *Policy Cancellation*
- *Customer Lost*
- *Policy Change*
- *eSignature Completed*

» **Business Intelligence**

Experience significant gains on all levels of profitability, productivity and serviceability by using system data to intelligently automate actions.

» **Watchful Operations, 24/7/365**

Automation Center is like adding a fleet of employees to your agency. It doesn't just make an agency more efficient, it also makes an agency more effective.

» **Tailored Customer Touchpoints**

Independent insurance agencies understand the value of their interactions with clients, and they are clamoring to do more of it, and better. Automation Center lets agents take a set-it-and-forget-it approach for many of the personal touches that mean so much to their clients.

EZLynx