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Agents: Easy Does It

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[Pat Speer](#)

When it comes to growth, independent property/ casualty agents overwhelmingly point to “ease of doing business” as the keystone in the bridge to their success. Such is the conclusion reached by a study conducted by [Deep Customer Connections](#) and commissioned by [iter8](#), a provider of P&C insurance and agency interface software and portals.

Conducted in the fourth quarter of 2009, the study surveyed 405 independent agents and brokers in the United States and Canada to learn their perspective on carrier technology. The survey used open-ended questions and a ranking of specific functionalities important to the agents’ ability to compete, but not provided by the carriers they most frequently represent.

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Currently, agents are frustrated by many technology issues that cost them significant time in tasks—often clerical and repetitive in nature—and diminish their capacity to sell and service business, notes the report’s summary. Not surprising, of those queried, 31% reported that what they most like about the technology they do have is its ability to accelerate the completion of transactions.

While agents have varied needs, at the same time carriers differ in the technologies they deploy. The report suggests that the industry must decide how to support the effectiveness of the independent agency distribution system through use of more standardized technology. Individual carriers must decide how they want to compete on technology.

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The independent agents and brokers surveyed report significant and specific differences between their technology needs and what carriers currently offer, notes the report.

Agents ascribe much of the cause of poor ease of use to companies’ varied proprietary technology, ineffective use of technology and the implementation of technology that does not adequately take their needs into account, notes the report. In addition, they are of mixed minds about carriers “offloading workload to agents;” they appreciate the greater speed, accuracy and control that come with their doing more of the work at point of sale, but they feel exploited by taking on that work without additional compensation. They want real-time transaction capacity that starts and ends in their agency/brokerage management systems.

What agents want most from carrier technology is ease of use, including ready access and reliability of performance, according to the report. Agents also desire carrier technology that can integrate with their agency management system and offer real-time upload and download capability.

Single entry, easy information access and effective, reliable quoting are also important, but these issues will virtually disappear if carriers are successful at making their technology easy to use, and having it integrate with agency management systems, notes the research.

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