



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!***



Slattery GA

BOLLINGER, INC., A SUBSIDIARY OF
ARTHUR J. GALLAGHER & CO.

For More Information Contact :

Desmond Slattery: 732-996-0632 or desmond_slattery@ajg.com

* Quote engine not available in all states.



MyBenefitLink™ is our comprehensive cloud-based onboarding and benefit enrollment solution that's been helping brokers and general agents compete in the new world of technology.

MBL is designed to help you compete and WIN against other technology firms in your marketplace. MBL is easy to setup and easy to use.

Onboard New Employees

MyBenefitLink streamlines the onboarding process by minimizing administrative burden and maximizing employee engagement. Paperwork is a thing of the past! Employees log on and provide the required information for HR, benefits and payroll setup. The onboarding process is cut from days to minutes!

Benefit Enrollment and Open Enrollment

MBL streamlines the open-enrollment process, providing employees the opportunity to enroll in robust benefit offerings with products provided by different insurance companies, all in one place. MBL simplifies benefit administration all year long, so when an employee moves, has a child, or experiences a life event, updating information is simple. The employee logs on, makes the change, and e-signs the necessary documents for HR approval. Now, instead of updating multiple systems, HR only needs to access MBL when an employee makes a change.

A Place Where Employees Will Return Again and Again

MBL isn't just for onboarding. MBL is a place where your employees will return again and again to make changes, review policy revisions, update important documents, and access training videos.

The Right Ratio of People to Technology

MBL utilizes the perfect ratio of people (the brokers) to technology to ensure employee requests are compliant and ready to be authorized and implemented. MBL DOES NOT replace the brokers, it complements them! There's no system that can replace the broker's knowledge of the marketplace. So when other technology companies tell prospective clients that they don't need a broker with their system, we believe they are WRONG!

Retain Your Business

MBL facilitates the flow of information and reduces the amount of paperwork for you and your client. MBL is the #1 retention platform in the industry.

MyBenefitLink, The Broker's Preferred Weapon To WIN new Business!



Slattery GA

BOLLINGER, INC., A SUBSIDIARY OF
ARTHUR J. GALLAGHER & CO.

For More Information Contact :

Desmond Slattery: 732-996-0632 or desmond_slattery@ajg.com