

WHERE AGENCIES LOSE THE MOST HOURS

PROSPYR 305

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The three workflows worth automating first in independent agencies & brokerages.

The pattern: an agency runs on renewals and certificates, and both are date-driven. Handled by hand, the work stays invisible until something lapses: a certificate goes out late, a renewal call happens the day after it was needed, or a claim status goes unreturned. These three come first:

WHERE IT GOES • WHERE TO START FIRST

Certificates of Insurance Issuance

3 to 6 hrs/wk

The same certificate pulled, completed, and emailed for every request, often on the same day it is asked for. Automating issuance from the policy record removes the highest-frequency task in the agency and ends the scramble when a client needs one inside the hour.

Renewal Pipeline & Lapse Prevention

measured in lapsed commissions

Renewals surface while the desk is buried, get worked late, or occasionally do not get worked at all. An automated pipeline surfaces every renewal at 90, 60, and 30 days with the outreach drafted, so the commission stops depending on someone remembering.

Claims Status & Client Updates

2 to 5 hrs/wk

Chasing an adjuster, retyping claim details into a carrier portal, then telling the client what you already told them last week. Automated status pulls give the client a live view and free the desk from repeating itself, which is also the fastest way to stop the status phone call.

STEP 1

Assess (Free 20-Min Scan)

We rank the book by renewal date and touch cost, then say plainly what is not worth automating. Annoyance is not the same as expense.

STEP 2

Build & Integrate

Connective bridges around AMS360, Applied Epic, EZLynx, and HawkSoft. Producers keep every market and coverage decision, and no automation ever binds coverage.

STEP 3

Run With Receipts

Every issuance and status pull logged and attributable to a policy and a date. You own the infrastructure, not a per-seat license that grows with headcount.

THE PROSPYR 305 GUARANTEE

One workflow, automated in 30 days, saving at least 10 hours a week, or you do not pay.

Full policy data sovereignty, no per-seat vendor tax, and licensed-staff oversight throughout.

Next Step: Book Your Free Agency Proof Scan

Bring your highest-friction renewal block or certificate backlog. We map it live at prospyr305.com/contact.

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