

Your producers are doing CSR work. Your CSRs are **drowning in admin.** And your renewals are slipping out the back door.

Multi-location independent agencies have a structural problem most owners can see but cannot solve from inside the business. Licensed producers spending 40% of their day on service calls. Renewals worked reactively in the last 30 days. Quotes taking three days when prospects expected three hours. Voice agents outsourced overseas, hired and retrained every six months. **The work is not the problem. The system underneath the work is.**

2.5 hrs

per day, per licensed agent, lost to routine admin — certificate requests, payment inquiries, data entry.

47 min

average time per quote at non-automated agencies. Agencies using AI workflows do it in 11 minutes.

90%

policy retention is the gold standard. Most agencies sit at 84% and cannot tell you why.

THE SIX PILLARS — PICK ANY TWO TO START

We diagnose two pillars at a time. Most agencies start with the two that hurt most — usually renewals and servicing. Each pillar has a defined start, end, and what is explicitly out of scope.

PILLAR 1 — RENEWALS & RETENTION

— Pre-renewal review, re-quoting, coverage gap surfacing. Where retention is leaking and which producers are losing it.

PILLAR 2 — CLIENT SERVICING

— COIs, endorsements, policy changes, ID cards. After-hours coverage and AI voice deployment where it actually fits.

PILLAR 3 — NEW BUSINESS ACQUISITION

— Lead intake to bound policy. Routing, qualification, producer hit ratio, follow-up cadence, source quality.

PILLAR 4 — CROSS-SELL & ACCOUNT ROUNDING

— Book analysis, mono-line client identification, trigger events. Moving average policies per client from 1.3 to 2.1+.

PILLAR 5 — QUOTING & RATING WORKFLOW

— Data intake, AMS prefill, comparative rater, carrier portal entry. From 47 minutes per quote to 11.

PILLAR 6 — PRODUCER PRODUCTIVITY & PIPELINE

— Producer time on admin vs. selling, pipeline visibility, deal aging. Activity tracking in your AMS — no guesswork.

WHAT CHANGES WHEN THE SYSTEM WORKS

Producers sell. CSRs serve.

Licensed agents stop spending 40% of their day on routine service. Each role does what it was hired for, and your commission per FTE moves the right direction.

Renewals stop slipping.

Pre-renewal workflows run 90 days out, not 30. Coverage gaps surface before the client shops. Retention climbs from 84% toward the 93%+ benchmark.

The agency runs in your AMS.

EZLynx, Applied Epic, AMS360, HawkSoft — your existing system becomes the operating layer. No replatforming. Voice agents and AI deploy where they actually belong.

THE ENGAGEMENT

Agency Friction Mapping

Ten business days. Structured interviews with your principals, producers, and CSRs across all locations. A review of your AMS, comparative rater, and carrier workflow data — including how policyholder data is organized across your systems and whether any carrier compliance or E&O documentation obligations attach to the workflows assessed. A written report with the specific revenue leaks across your two chosen pillars, and a scoped recommendation for what to fix first. **Built for multi-location agencies serious about scaling without hiring more producers.**

\$5,000

ENTRY ENGAGEMENT

Applies in full toward the build if you move forward within 45 days.

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Start with a 20-minute conversation.

Every engagement is scoped to the agency.
No two operating systems look the same.