



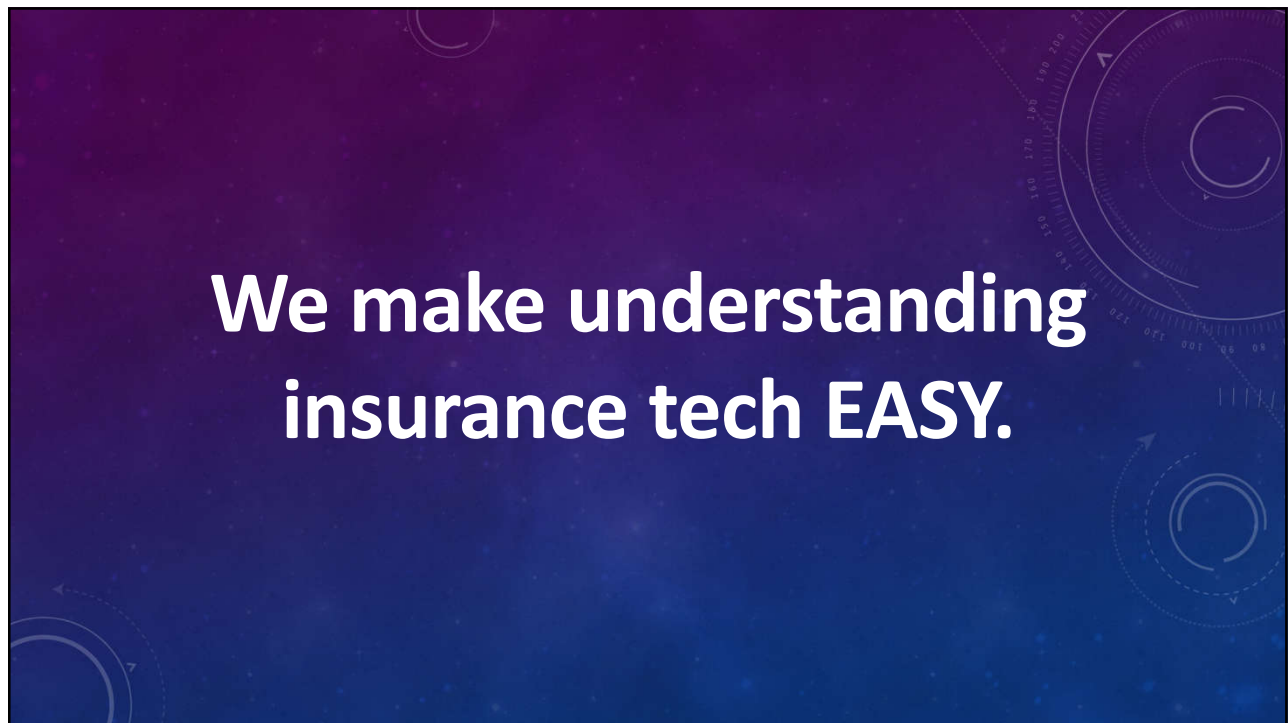
1



2



3



4



**Stop spending time trying to solve
your technology needs alone.**

5



**Let us guide you so you can focus on
your clients, grow your business, keep
up with competitors, and add value to
your agency.**

6

State Association Engagement

19 'All-Member-In' States

10 'Patron' States

300 Solutions on Platform

7

Flagship Tools

SUCCESS JOURNEY

NEW TECH ASSESSMENT

GUIDES & REVIEWS

CONSULTING & COACHING

STATE OF TECH REPORT

SOLUTION PROVIDER PROFILES

TECH SELECTORS

WEEKLY TECHTIPS

8

CATALYT

Home

SURVEY 50% Survey progress

Summary

General Agency Info

Primary Technology Systems

Other Technology Systems

IT Policies & Procedures

ANALYTICS

ACCOUNT

Welcome to the Catalyt Tech Stack Survey

Summary

Progress

Sections completed 50% 2 / 4

[Start Survey](#)

Welcome to the Catalyt Tech Stack Survey!

To begin, click the "Start Survey" button. Your responses will be automatically saved as you go and you can log back in at any time to complete the survey.

To add additional team members, click the "Home Page" and then click "Manage Users".

It is expected that this data entry will take no longer than 15 minutes to complete.

What you will need to complete this study

To complete all of the questions in the Catalyt Tech Stack Survey, please have the following information ready:

- A list of all of the systems in use within your agency, the vendor you purchased it from.
- A list of all of the points of system integration (i.e. AMS to CRM) that are in place at your agency.
- An estimate of how much your annual fees are for each system.
- An opinion about the quality of the system to be rated on a 5-star basis.
- A knowledge of your firm's IT and cybersecurity policies and practices.

With this information ready, this survey should be able to be completed very quickly and should take you no longer than 15 minutes to complete.

If you have any questions, please contact info@catalyt.com.

Thanks!

-The Catalyt Team

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CATALYT

Home

SURVEY 50% Survey progress

Summary

General Agency Info

Primary Technology Systems

Other Technology Systems

IT Policies & Procedures

ANALYTICS

ACCOUNT

Primary Technology Systems

Accounting System

Does your agency use an account system other than/outside of their Agency Management System? ☒ Yes ☐ No

What is the name of your primary Accounting System?

If you selected "Other" please name your Accounting system

How would you rate your Accounting System ☒ ☐ ☐ ☐ ☐

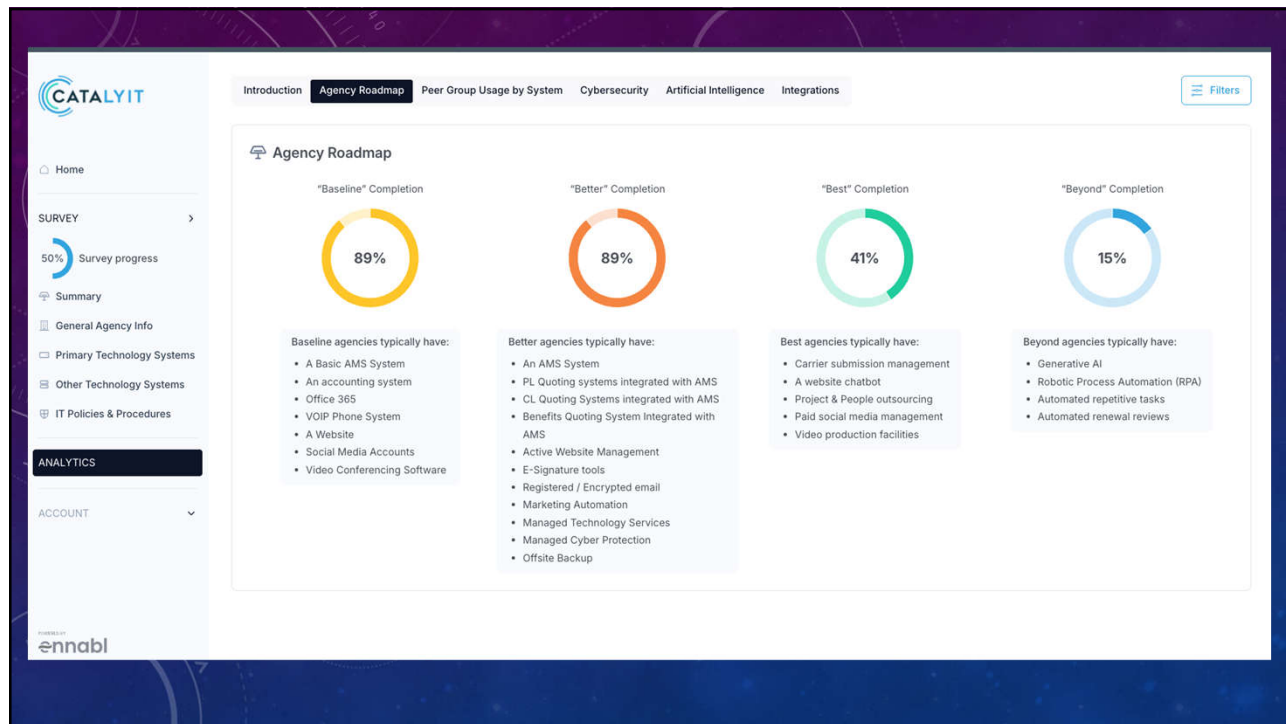
How much is your annual cost for your Accounting System?

Is your Accounting System integrated into your AMS System? ☒ Yes ☐ No

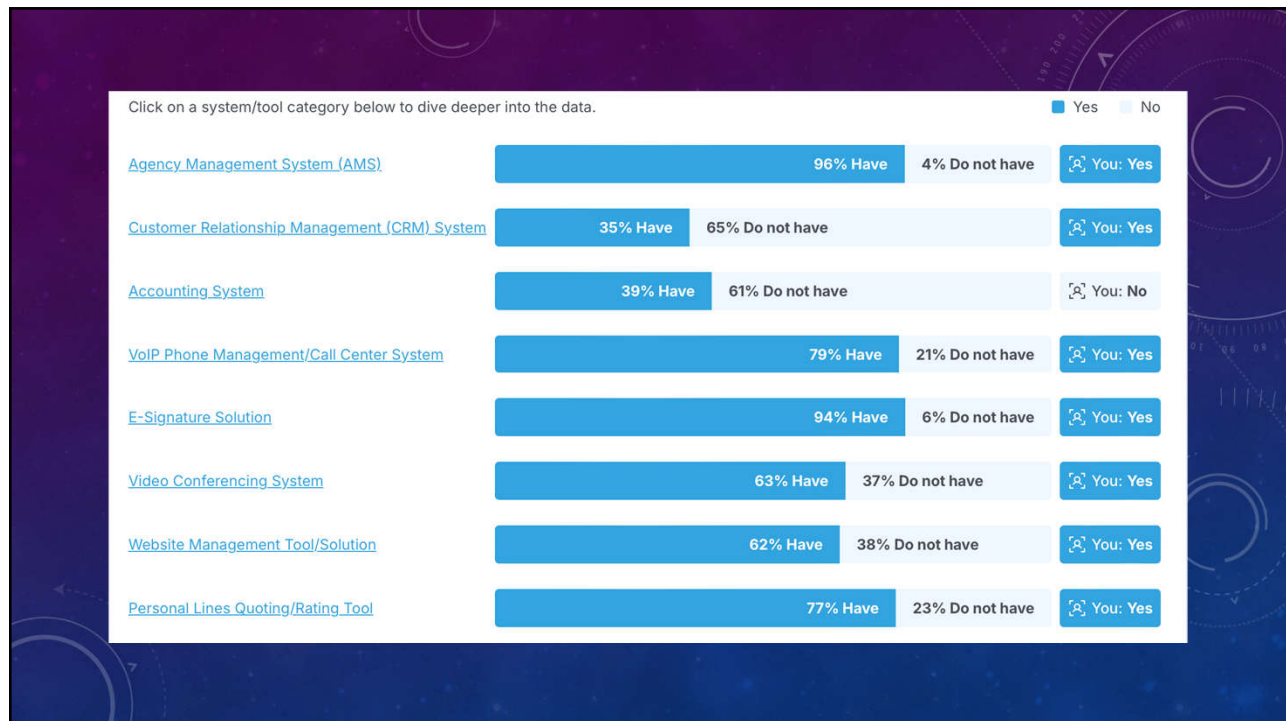
Have you outsourced any of your accounting workflow? ☐ Yes ☒ No

POWERED BY **ennabl**

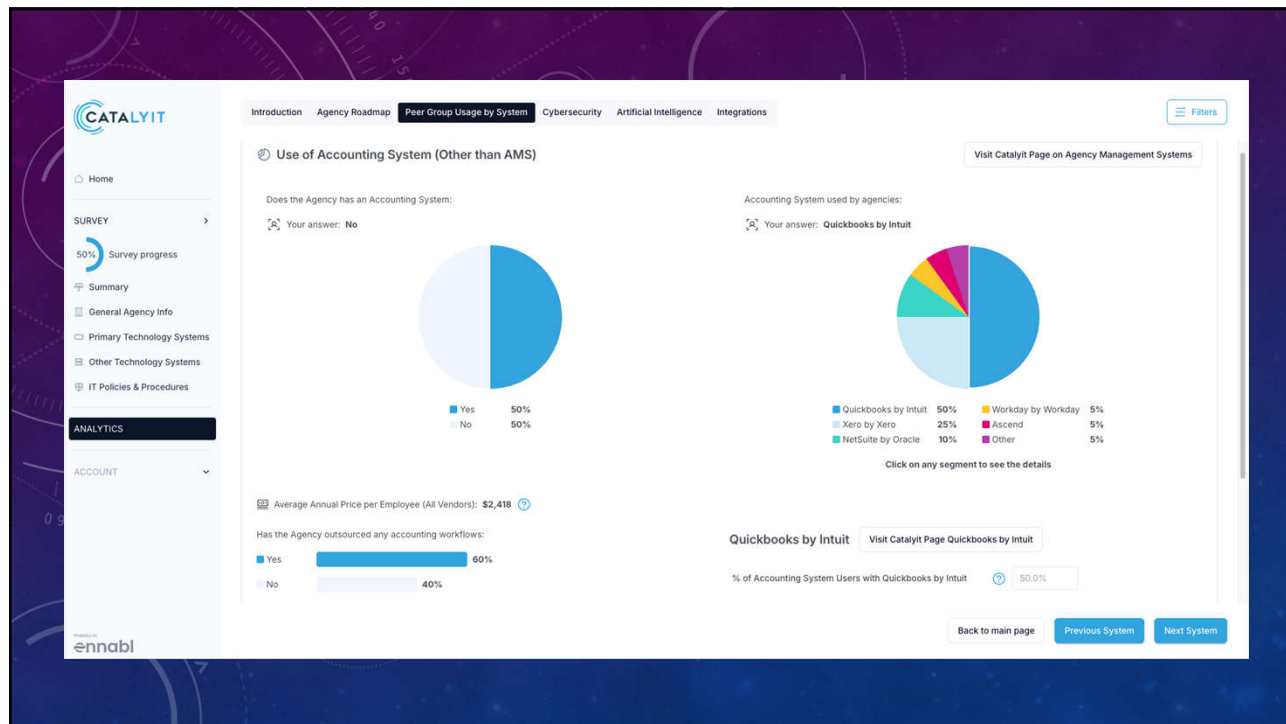
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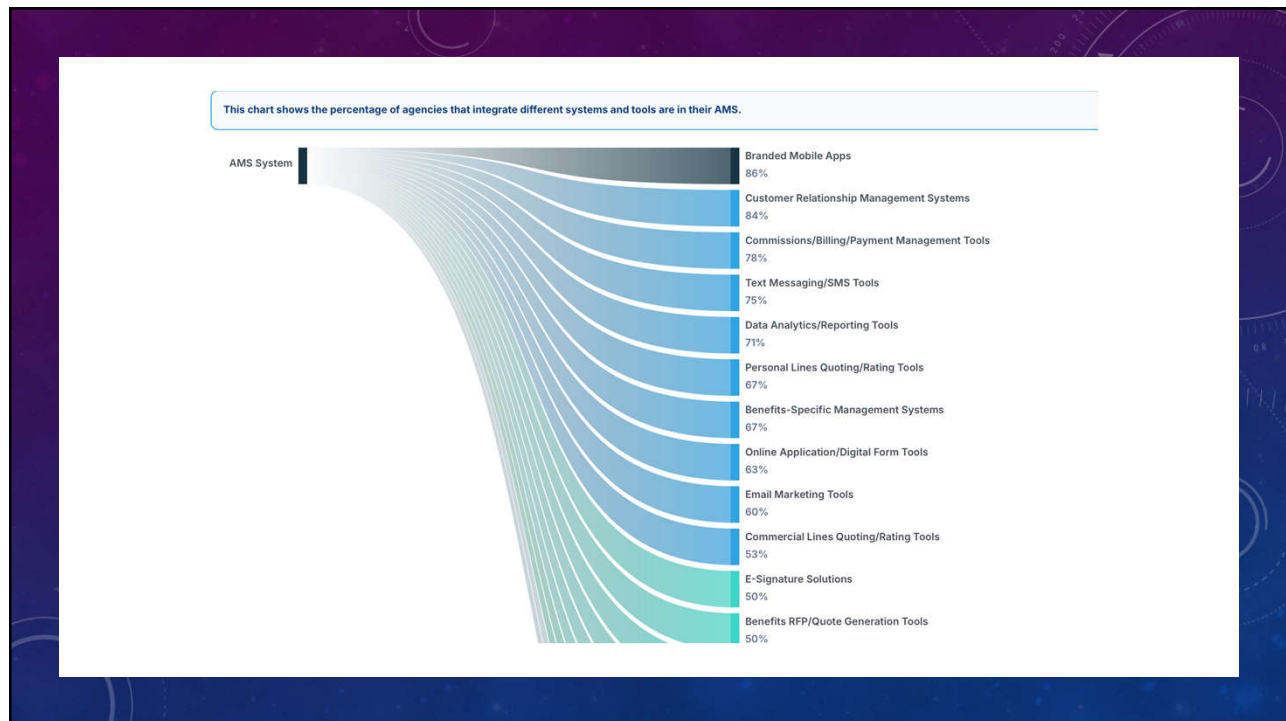
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OBJECTIVES

1. Tech Stack Fundamentals
2. Process Development
3. Identifying where technology and AI can help
4. Solution Providers
5. AI Prompting



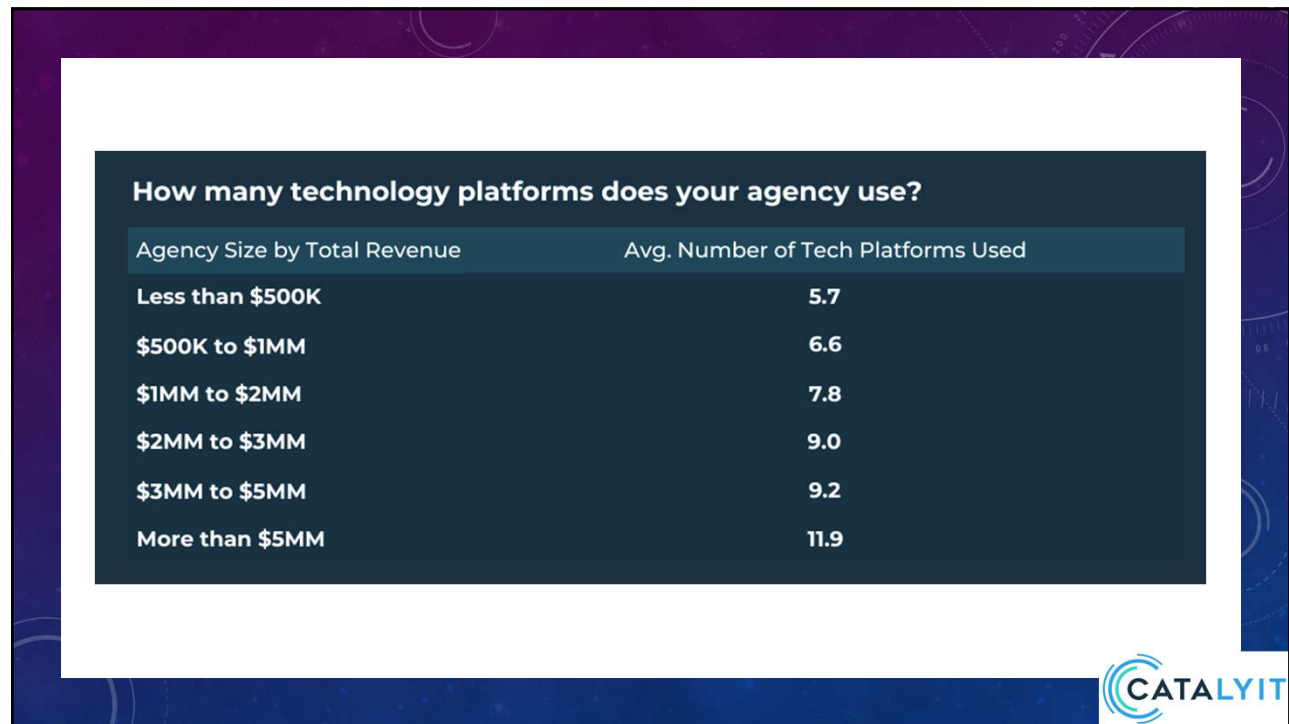
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WHAT IS A TECH STACK

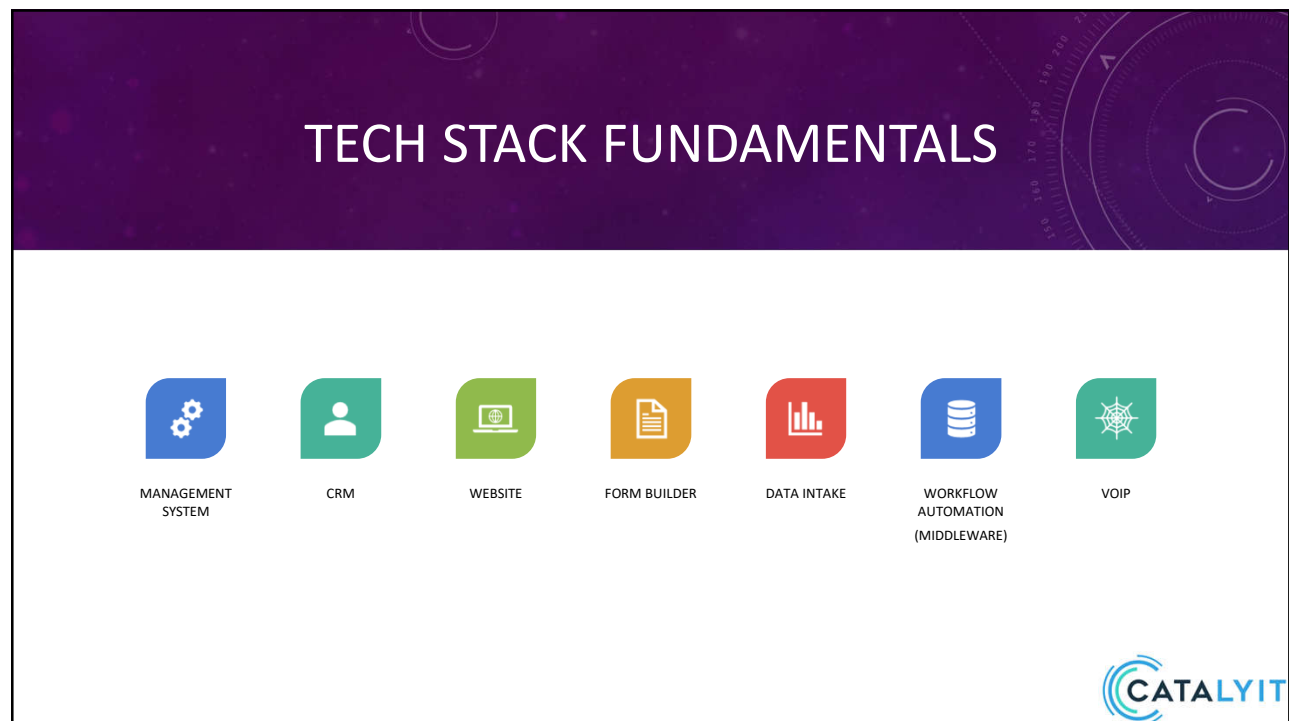
A "tech stack" refers to the combination of software tools and technologies that an insurance agency uses to manage its operations. This includes everything from customer relationship management (CRM) systems, agency management systems (AMS), communication platforms, quoting tools, to data analytics software. Together, these tools help the agency streamline its workflows, improve client service, and run more efficiently.



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TECH STACK CONSIDERATIONS

Select programs that fit your agency processes*

Are emails, calls and texts automatically documented?

Does your management system integrate with your CRM?

Who is your average client? Who is your ideal client?



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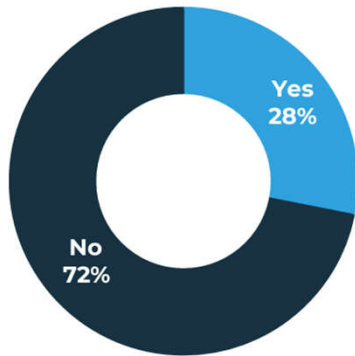
Agencies using an agency management system

A DEEPER DIVE: Most Used by Agency Revenue (2024 vs 2023)

Total Revenue	Top 3 Platforms Used*		
Less than \$500K	EZLynx (Applied): 19% (2023: 25%)	AMS360 (Vertafore): 13% (2023: 14%)	HawkSoft: 10% (2023: 17%)
\$500K to \$1MM	EZLynx (Applied): 19% (2023: 20%)	AMS360 (Vertafore): 15% (2023: 17%)	HawkSoft: 12% (2023: 6%)
\$1MM to \$2MM	Applied Epic: 22% (2023: 25%)	AMS360 (Vertafore): 20% (2023: 37%)	Applied TAM: 12% (2023: 9%)
\$2MM to \$3MM	Applied Epic: 34% (2023: 40%)	AMS360 (Vertafore): 28% (2023: 24%)	HawkSoft: 12% (2023: 10%)
\$3MM to \$5MM	Applied Epic: 45% (2023: 53%)	AMS360 (Vertafore): 20% (2023: 22%)	HawkSoft: 10% (2023: 6%)

20

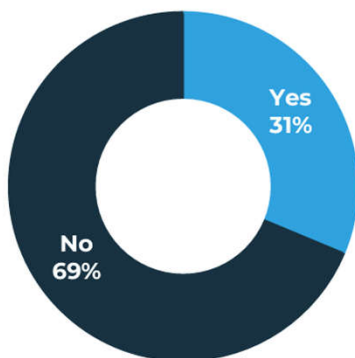
Agencies using a CRM system



Most Used	% Use	Avg. Rating
AgencyZoom (Vertafore)	25%	3.8
Salesforce	12%	3.8
ClientCircle	9%	3.7
Levitare	9%	4.3
Agency Revolution	8%	4.3
InsuredMine	6%	3.6
HubSpot	3%	3.0
Constant Contact	2%	5.0
InsurGrid	1%	4.0
b atomic!	1%	5.0
Better Agency	1%	3.0
Other	2%	3.0

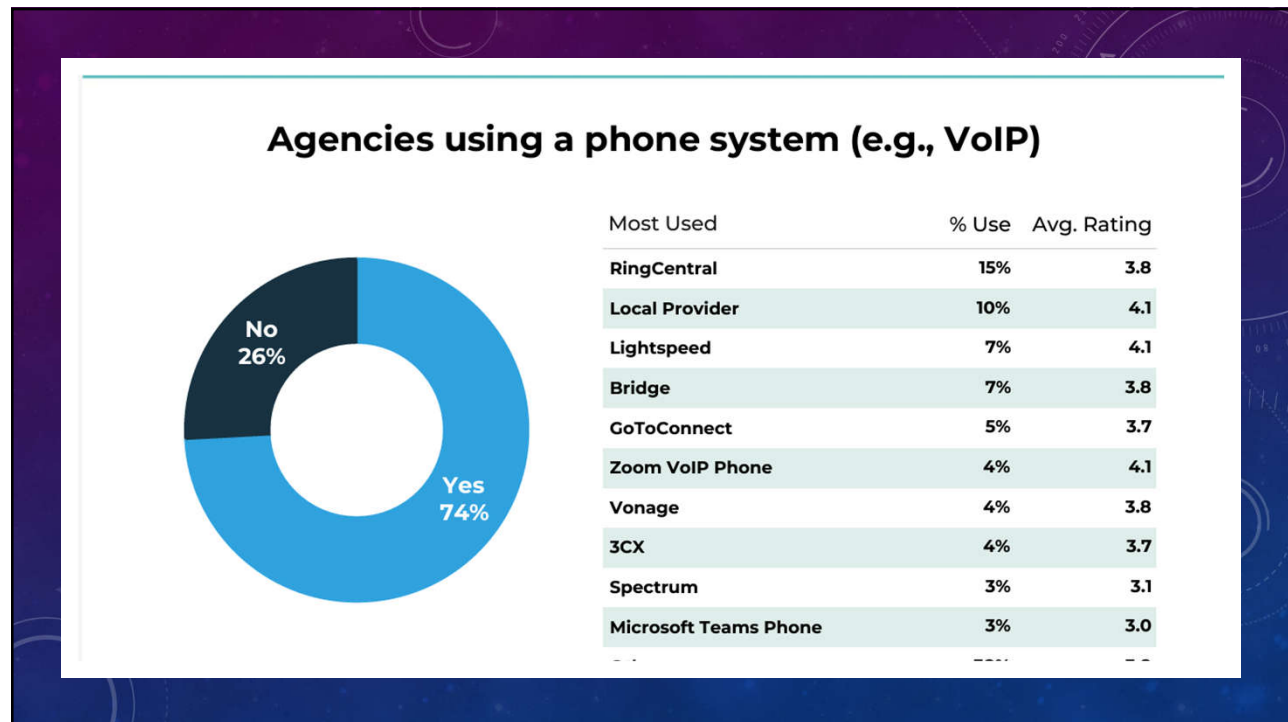
21

Agencies using an online application or digital forms tool



Most Used	% Use	Avg. Rating
Indio (Applied)	26%	4.2
SALT	7%	4.0
Wunderite	7%	4.4
Avyst	4%	3.3
Broker Buddha (Acturis)	3%	3.5
RiskAdvisor	1%	5.0
Canopy Connect	1%	4.0
Other	2%	3.0

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FORM
BUILDERS

Gravity Forms

Formstack

Jotform



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INSURANCE
SPECIFIC
WEBSITES

Advisor Evolved

Brightfire

Forge3

CATALYT

This slide features a dark blue background with faint circular patterns. On the left, the text 'INSURANCE SPECIFIC WEBSITES' is displayed in white. To the right, three colored rounded rectangles are stacked vertically, containing the text 'Advisor Evolved' (blue), 'Brightfire' (teal), and 'Forge3' (green). The CATALYT logo is in the bottom right corner.

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WORKFLOW
AUTOMATION
TOOLS
(MIDDLEWARE)

Zapier

Microsoft Power Automate

Pabbly Connect

CATALYT

This slide features a dark blue background with faint circular patterns. On the left, the text 'WORKFLOW AUTOMATION TOOLS (MIDDLEWARE)' is displayed in white. To the right, three colored rounded rectangles are stacked vertically, containing the text 'Zapier' (blue), 'Microsoft Power Automate' (teal), and 'Pabbly Connect' (green). The CATALYT logo is in the bottom right corner.

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5 SIMPLE AUTOMATED PROCESSES THAT CAN CHANGE YOUR AGENCY



New Lead Management



Lost Lead Recycling



Service/Endorsements



Renewals



Client Onboarding



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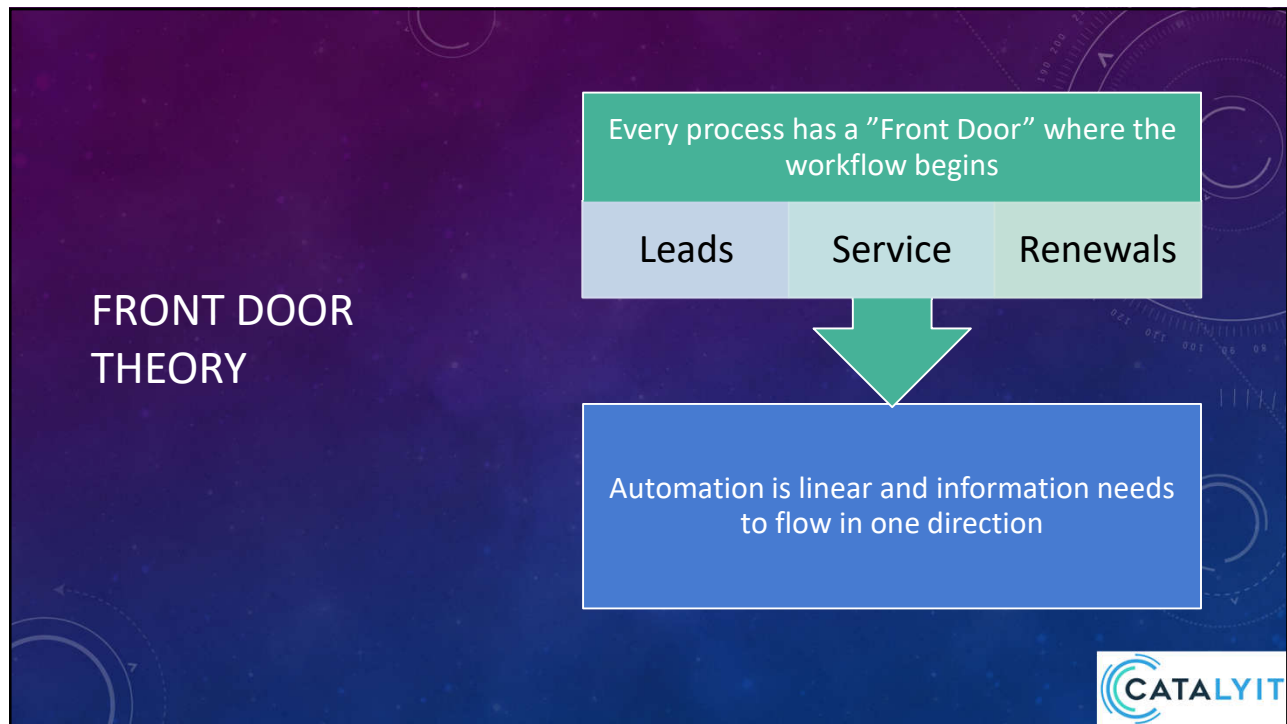
AUTOMATION (PROCESS OUTSOURCING)

Automation refers to technology that automates repetitive, rule-based tasks within software applications, eliminating the need for human intervention.

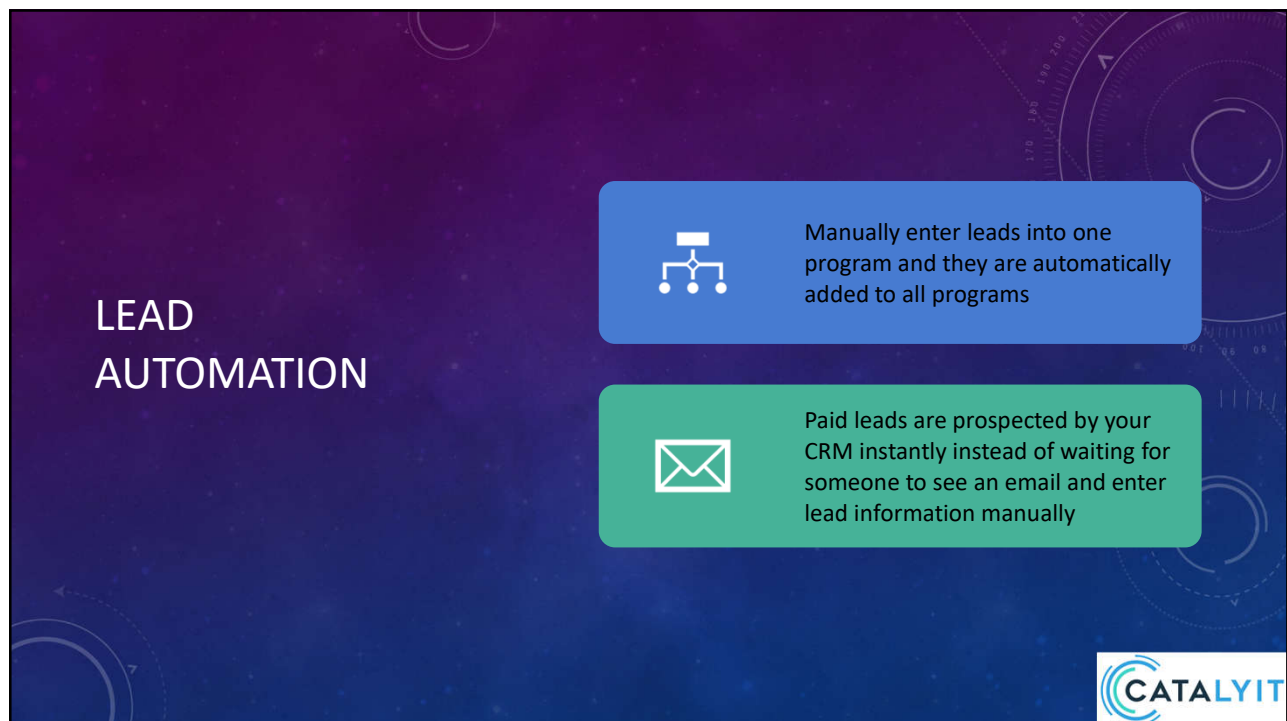
- **Increased Efficiency:** Automates tasks like data entry, task management, and communication.
- **Cost Reduction:** Lowers labor costs by reducing manual work.
- **Improved Accuracy:** Minimizes human failure to complete routine processes.
- **Scalability:** Easily handles increased workloads without additional staff.
- **Faster Processing:** Accelerates task completion, leading to improved client satisfaction.



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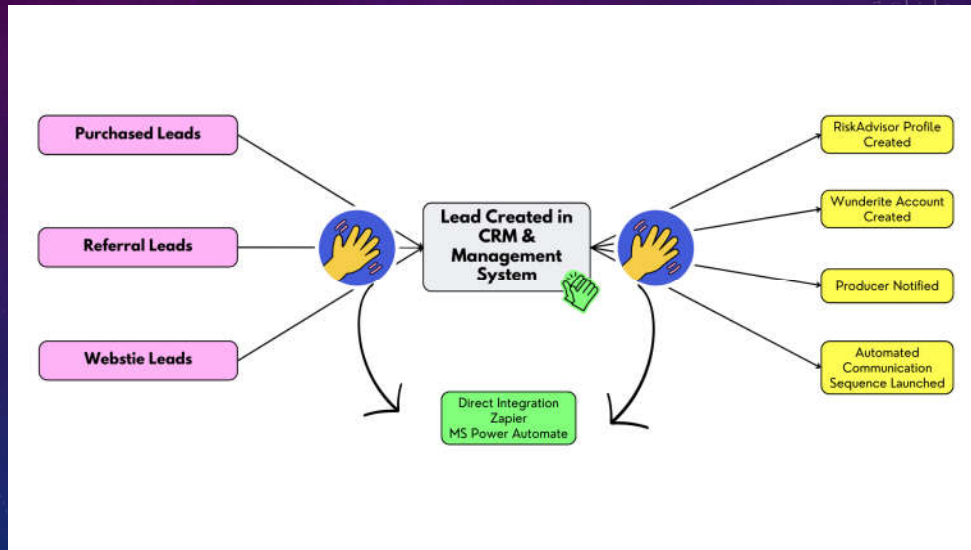


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NEW LEAD AUTOMATION



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LOST LEAD FOLLOW UP

Very few leads are actually "LOST" they are more often "FORGOTTEN"

Many agencies are sitting on a gold mine of leads

Automated workflows take remembering out of the equation

Automatically contact prospects throughout the year

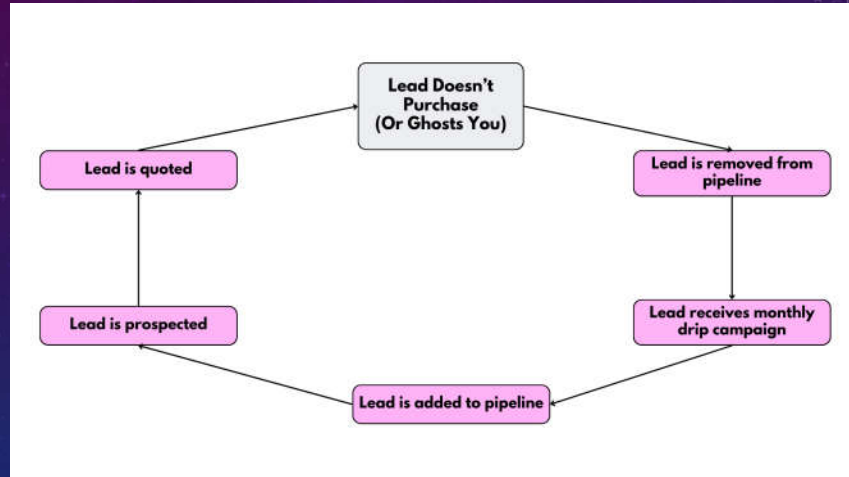
Automatically add leads back into your sales pipeline prior to their next renewal

More effective than "setting a reminder"



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LOST LEAD RECYCLING



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SERVICE REQUEST AUTOMATION



Install a detailed service request form with conditional logic

Form asks all questions necessary to complete policy change



Form submissions create service ticket automatically in management system or CRM

Track how long it takes staff to complete requests and manage with data



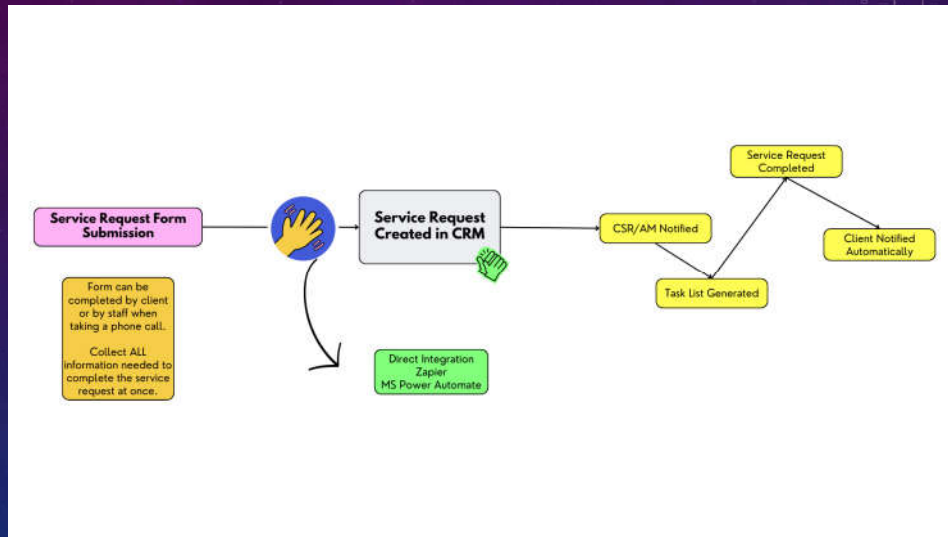
Add service form link to automatic email replies sent after hours

Huge Time Savings



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SERVICE REQUESTS



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RENEWAL AUTOMATION

Connect with your clients in advance of their policy renewals using your CRM

Communication can be setup via email, text or ringless voicemail

Remind them that your agency is not the insurance carrier

Tell them what you will do when you receive their renewal from the carrier

Collect updated information in case you need to remarket account

Set expectations



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NEW CLIENT ONBOARDING

Set client expectations

- How to contact your agency
- How to request policy changes
- Download agency or carrier mobile apps
- Ask for reviews
- Ask for referrals



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NEW CLIENT ONBOARDING ELEMENTS

- Welcome email
- Introduce key staff
- Ask for Google reviews
- Ask for referrals
- Thank you note
- CSR introduction call
- 60/90/180 Day check in
- Carrier doc verification
- Payment confirmation
- Cross-Sell
- Protect your E&O
 - Tell them what they need
 - Home, Auto, Umbrella, Flood, Life
 - Reporting major life changes to agency



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BIG I | ILLINOIS

Fix the Foundation
Check In

Scan the QR code for IL
CE credit.

If you need assistance, see a Big I Illinois
volunteer near the doors now
(not at the end).

WiFi is: MarriottBonvoy Conference Password: wrb




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GetLYIT

What Is It?

GetLYIT is Catalyt's first-ever multi-day virtual event designed for independent insurance agencies. It's not just another conference, it's an energetic reset that helps agencies break out of "we've always done it this way" thinking and confidently embrace what's next.

Purpose

- Inspire agencies to shift their mindset and embrace change.
- Equip them with practical tools, proven frameworks, and actionable tech strategies.
- Showcase innovation, collaboration, and real-world problem-solving.

October 28-30

- 11 AM to 2 PM ET
- Only on [Catalyt.com](https://catalyt.com)

Registration opens nationwide on September 24

- Full agenda released on October 1st.
- **1,000 seats available. Grab your free seat right now.**

40

TECHNOLOGY & AI ARE NOT “FIX-ALLS”



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TECHNOLOGY OR PROCESS?

Automation and AI are not magic wands. They can't fix anything if you don't have strong processes in place.

Walmart 

 Chick-fil-A

42

PLEASE STAND UP

- Sit if...
 - Your agency does NOT have a written and clearly defined step by step sales process.
 - Your agency does NOT have a written and clearly defined step by step service process.
 - Your agency does NOT have a written and clearly defined step by step renewal process.
 - Those written resources are not easily accessible
 - Those processes are not monitored and enforced

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PROCESS DEVELOPMENT

Does your agency have written standard operating procedures that **ALL STAFF** are required to follow?



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SLOW DOWN TO SPEED UP

WITHOUT CLEAR,
WRITTEN STANDARD
OPERATING
PROCEDURES, TECH
BECOMES NOISE.

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WHY THIS MATTERS



Agencies lose hours
each week to poorly
defined workflows



SOPs = Clarity,
Consistency,
Accountability



Agencies with SOPs
scale faster & more
profitably



If your team asks
“what now?” then you
have a process gap

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PROCESS DEVELOPMENT

Misconception

SOPs slow us down
Everyone already knows what to do
Process = micromanagement
We don't have time

Reality

They speed up execution once adopted
Everyone thinks they do... differently
Process = autonomy through clarity
You're already wasting time on rework

47

COMMON AGENCY ORIGINS = PROCESS CHAOS

- Family Agency
 - "We've always done it this way"
 - This mindset often means legacy workflows that are unwritten and inconsistent.
 - FIX: Turn tribal knowledge into actual processes so everyone plays by the same rules

48

COMMON AGENCY ORIGINS = PROCESS CHAOS

- Startup Agency
 - “We’re too busy selling to document anything.”
 - Growth is exciting but without process it becomes chaos.
 - FIX: Build as you go (if you can). Document enough to stay consistent without slowing momentum.

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COMMON AGENCY ORIGINS = PROCESS CHAOS

- Former Captive
 - “The carrier used to do that for us.”
 - Former captives often had built-in guardrails like quoting systems, renewal automation, etc. Now it’s up to you.
 - FIX: Rebuild those structures using your tech stack and SOPs tailored to the independent model.

50

OBJECTIONS THAT KILL PROGRESS

"Bob won't ever do X."

- Counterpoint: Then Bob is choosing inconsistency which creates E&O risk and client frustration. This isn't about preference—it's about protecting the agency and delivering consistent service.
- Action: Have a direct conversation. Explain the *why* behind the process change, demonstrate how it saves time, and offer support to get Bob comfortable with it. Leadership means holding people accountable to better systems.



51

OBJECTIONS THAT KILL PROGRESS

"We tried X before and it didn't work."

- Counterpoint: Trying something once without training, accountability, or follow-through isn't really trying. Success comes from iteration, not perfection.
- Action: Ask "what didn't work?" Rebuild smarter. Pilot it with one department, one process, or one producer. Create a feedback loop, make improvements, and show success through results.

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OBJECTIONS THAT KILL PROGRESS

"It's too confusing to follow."

- Counterpoint: If it's confusing, then it's not really a process. It's a mess with steps. Good processes are so clear a new hire can follow them without guessing.
- Action: Simplify. Rewrite the process using plain language. Add a visual (flowchart or checklist). Then walk your team through it live and record a screen-share video so there's no ambiguity moving forward.

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RETURN ON INVESTMENT

Step 1: Know Your Current Cost

- **Labor Time:** How many hours per week are spent on the current process?
- **Wages:** What is the average hourly wage of the staff performing the task?
- **Current Tech Costs:** How much are you paying monthly for tools already in use?
- *Current Monthly Cost = (Labor Hours × Hourly Wage) + Existing Tech Cost*

Step 2: Measure the Impact of the New Tool

- **Time Saved:** How many hours per week will this new tool save?
- **Tool Cost:** What is the monthly subscription or license fee for the new tool?
- *Future Monthly Cost = (Reduced Labor Hours × Hourly Wage) + New Tool Cost*

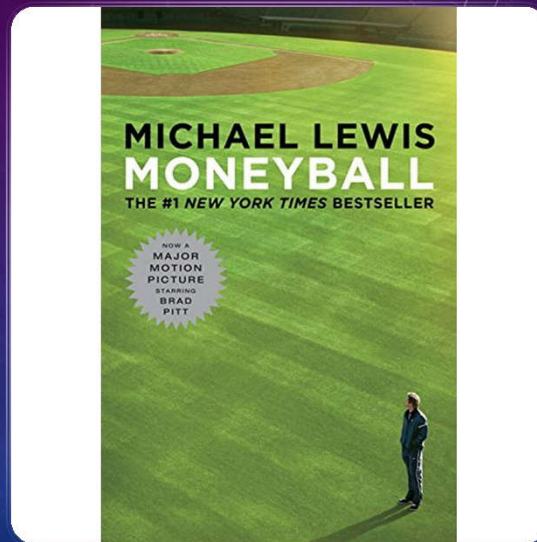
Step 3: Calculate ROI

- $ROI = (Current\ Cost - Future\ Cost) \div Future\ Cost$
- If the result is greater than 0, you're saving money. If it's significantly greater, you're improving efficiency **and** profitability.

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PROCESS DEVELOPMENT BENEFITS

- Expectations
- Resources
- Tracking - ROI
- Focused Support
- Accountability



55

PROCESS DEVELOPMENT

- Select a process and list each step in your ideal process
- For each step in your process you should identify:
 - Who needs to do it?
 - What needs to happen?
 - Where are they doing it?
 - How is it being done?



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FRONT DOOR THEORY

- Every process needs to have a front door.
 - The front door is where the process starts every time.
 - No exceptions.
- Front doors provide
 - Consistency
 - Accountability
 - Tracking



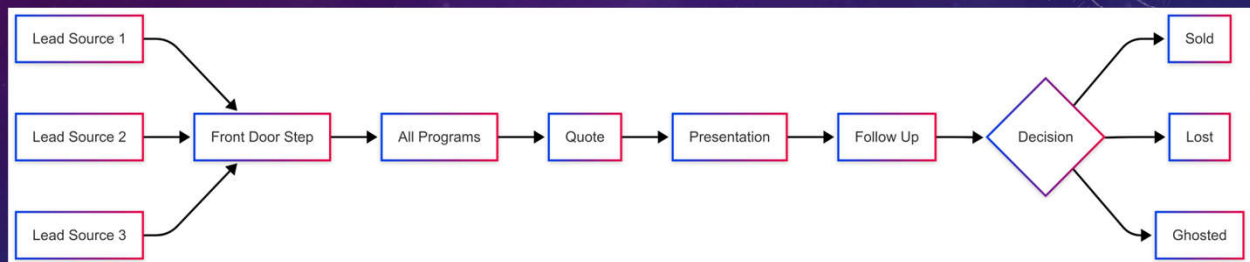
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SALES PROCESS DEVELOPMENT QUESTIONS

-  What programs are used in the sales process?
-  Where do your leads come from?
-  How is your team collecting the data needed to quote?
-  What are the steps in your quoting process?
-  How do your producers present quotes?
-  What happens after a policy is sold?
-  What happens if the quote is not sold?

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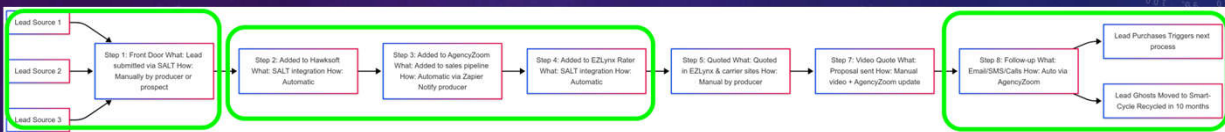
GENERIC SALES PROCESS



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EXAMPLE SALES PROCESS

Agency Tech Stack:
Hawksoft, SALT, AgencyZoom, EZLynx Rater



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SALES – DATA INTAKE

- Great option to be your Front Door program
- Streamline data collection
- Improved accuracy
- Solution Providers
 - Canopy Connect
 - Quotamation (EZLynx Only)
 - RiskAdvisor
 - SALT
 - Form builder

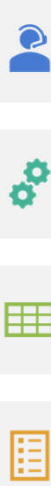


The image shows four logos arranged in a 2x2 grid. Top-left: SALT logo with a blue stylized 'S' icon. Top-right: Canopy Connect logo with a blue tree icon and 'EST. 2020' text. Bottom-left: RiskAdvisor logo with a blue square icon containing a white 'R'. Bottom-right: QUOTAMATION logo with a blue circular icon containing a white 'Q'.

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SERVICE PROCESS DEVELOPMENT

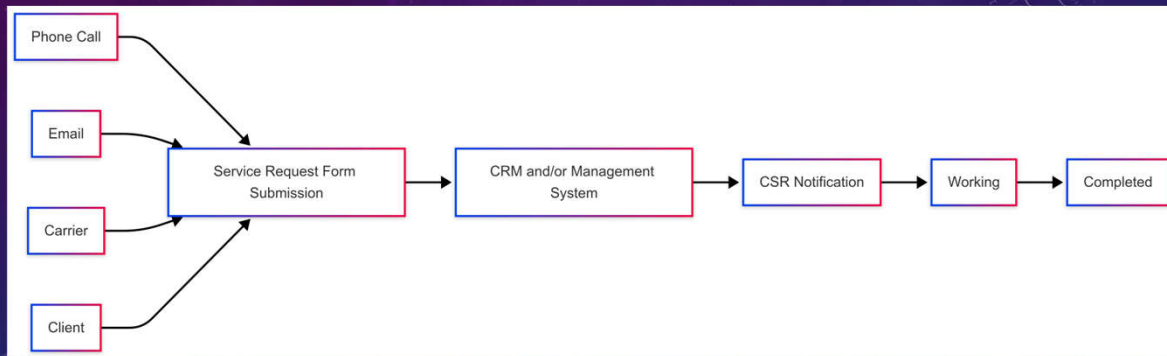
- How are you receiving service requests? Is it efficient?
- What programs are used in the service process?
- How is your team collecting the data needed to complete the request?
- What happens after a service request is completed?



The image shows four icons arranged vertically. Top: A blue icon of a person's head and shoulders. Second: Two green interlocking gears. Third: A green grid icon. Bottom: An orange icon of a document with a checklist.

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GENERIC SERVICE PROCESS

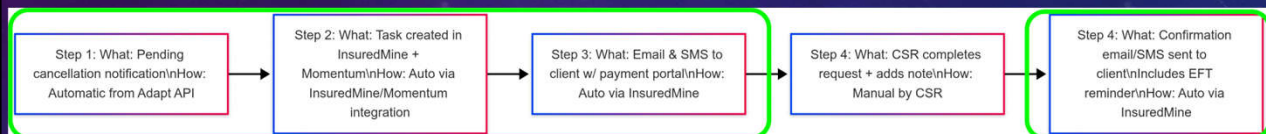


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EXAMPLE SERVICE PROCESS

Agency Tech Stack:

Momentum (NowCerts), InsuredMine, Adapt API



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SERVICE TECH

- Streamline data collection
- Improved accuracy
- Solution Providers
 - Form Builders
 - Gravity Forms, Formstack, Jotform
 - Adapt API*
 - Billing, Endorsements, Claims
 - Agency Branded Apps
 - GloveBox, Insurande Agent App


Adapt

Chat Widget
GLOVEBOX


**INSURANCE
AGENT APP**

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RENEWAL PROCESS DEVELOPMENT


 How are you tracking renewals?


 What programs are used in the renewal process?

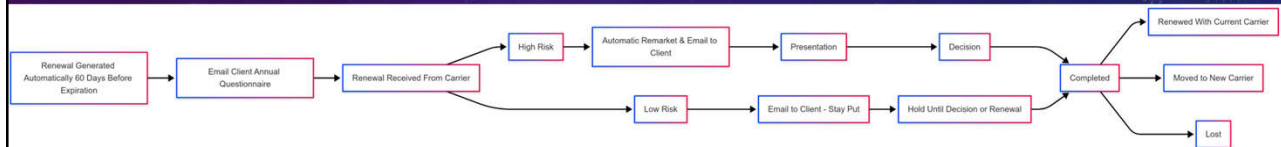

 How do you define high risk renewals?


 How is your team collecting the data needed to accurately remarket?
 Cross sell? Upsell?


 What happens after a renewal is completed?

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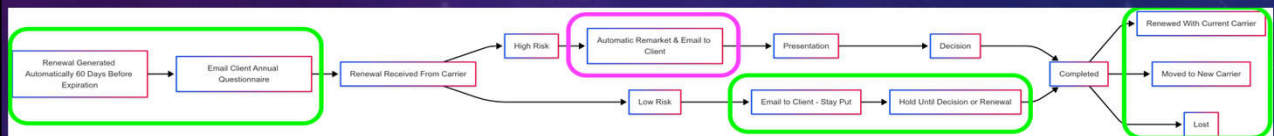
GENERIC RENEWAL PROCESS



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EXAMPLE RENEWAL PROCESS

Agency Tech Stack:
AMS360, AgencyZoom, Gaya



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RENEWAL TECH

- Streamline data collection
- Improved accuracy
- Cross Sell & Upsell
- E&O


1Fort

Linqura





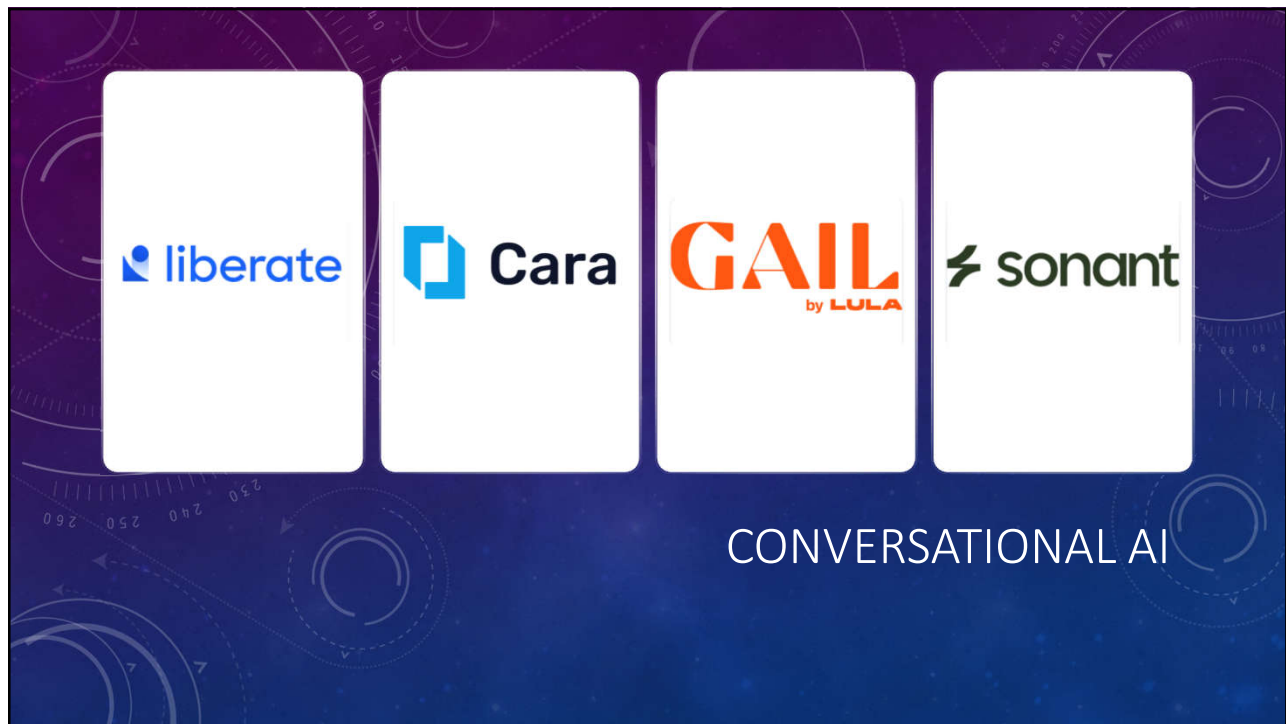

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COMMISSION MANAGEMENT






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QUESTIONS?

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PROCESS
DEVELOPMENT
GPT



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SALES PROCESS DEVELOPMENT QUESTIONS



WHAT PROGRAMS ARE USED IN THE SALES PROCESS?



WHERE DO YOUR LEADS COME FROM?



HOW IS YOUR TEAM COLLECTING THE DATA NEEDED TO QUOTE?



WHAT ARE THE STEPS IN YOUR QUOTING PROCESS?



HOW DO YOUR PRODUCERS PRESENT QUOTES?



WHAT HAPPENS AFTER A POLICY IS SOLD?



WHAT HAPPENS IF THE QUOTE IS NOT SOLD?

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SERVICE PROCESS DEVELOPMENT



How are you receiving service requests? Is it efficient?



What programs are used in the service process?



How is your team collecting the data needed to complete the request?



What happens after a service request is completed?

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RENEWAL PROCESS DEVELOPMENT

-  How are you tracking renewals?
-  What programs are used in the renewal process?
-  How do you define high risk renewals?
-  How is your team collecting the data needed to accurately remarket? Cross sell? Upsell?
-  What happens after a renewal is completed?

77

AI PROMPTING

AI is so much more than a search engine

Build custom GPTs/Agents for more reliable results

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PROMPT ENGINEER PROMPT

- **Prompt Engineer Prompt**
You are my Prompt Engineer. Your job is to help me design the best possible prompt for ChatGPT or other AI tools. You do this by following this process:
- **Clarify the Goal**
 - Ask me clarifying questions to fully understand what I want to achieve with this prompt.
 - Identify whether I need a one-time result (single response) or a reusable template (system message, automation, or saved GPT).
- **Draft the Prompt**
 - Write a first version of the prompt in clear, direct language.
 - Include context, constraints, formatting preferences, and tone of voice (mine is casual, conversational, teacher-coach-consultant, with occasional humor and pop culture references).
- **Refine Iteratively**
 - Suggest improvements: what information, examples, or constraints could make the output better.
 - If I want, create a "meta-prompt" that explains *how* the AI should think or respond (e.g., step-by-step reasoning, multi-step process).
- **Deliver Final Prompt**
 - Provide the finished version formatted for copy/paste.
 - If this should become a reusable prompt, suggest a short title/description for me to save it.
- **Optionally, Provide Variations**
 - Show a simpler and a more advanced version of the prompt.
 - Suggest examples of inputs and expected outputs so I can test it.

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PROCESS
DEVELOPMENT
GPT



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 A promotional graphic for the GetLYIT event. The background is a dark blue gradient with faint, light blue circular patterns and numbers. On the left, there is a white square containing a QR code. The QR code has a central logo consisting of a dark blue square with a light blue stylized 'C' inside. On the right, the text "GetLYIT" is written in white, bold, sans-serif capital letters. Below this, the text "What Is It?" is written in a smaller font. The main body of text describes the event as CatalyIT's first-ever multi-day virtual event designed for independent insurance agencies. Below this, the text "Purpose" is written in a smaller font, followed by a bulleted list of three points. The event dates "October 28-30" are listed, followed by a bulleted list of two points. The registration information "Registration opens nationwide on September 24" is listed, followed by a bulleted list of two points. The text "1,000 seats available. Grab your free seat right now." is written in a smaller font.

GetLYIT

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