

Policy quoting and comparison

Automatically generates multiple policy quotes from different carriers when a customer submits insurance requirements, then presents ranked comparison options to optimize coverage and pricing decisions.

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Get Your Blueprint

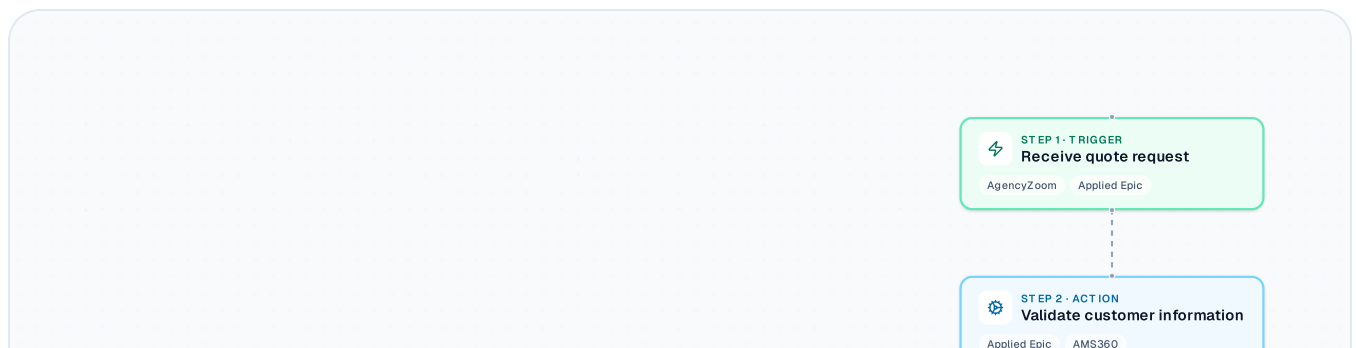


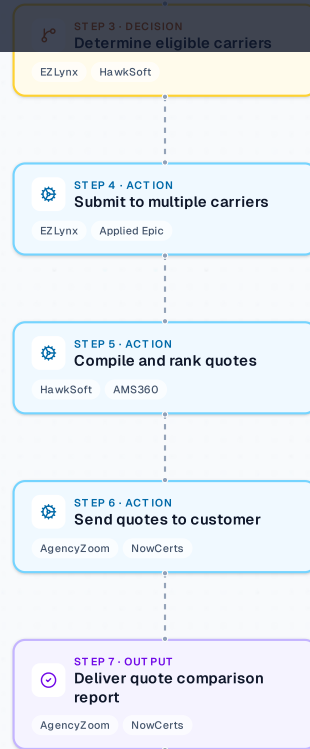
WORKFLOW TRIGGER

Customer submits insurance application or quote request through agency portal

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

Receive quote request

Customer completes insurance application form with coverage requirements, personal details, and risk information. System captures all data points needed for carrier submissions.

AgencyZoom

Applied Epic

2

 ACTION

Validate customer information

Automatically verify customer details, run MVR and credit checks, and validate property information against databases. Flag any data discrepancies for manual review.

Applied Epic

AMS360

3

 DECISION

Determine eligible carriers

Evaluate customer risk profile and coverage needs against carrier appetite and underwriting guidelines. Route to appropriate carrier networks based on eligibility criteria.

EZLynx

HawkSoft

4

 ACTION

Submit to multiple carriers

Simultaneously submit quote requests to 3-5 eligible insurance carriers through API integrations. Track submission status and carrier response times.

5

ACTION

Compile and rank quotes

Collect returned quotes, normalize coverage terms, and rank options by price, coverage quality, and carrier rating. Generate comparison matrix with recommendations.

HawkSoft

AMS360

6

ACTION

Send quotes to customer

Automatically generate personalized quote presentation with coverage explanations and send via email or customer portal. Schedule follow-up communications.

AgencyZoom

NowCerts

7

OUT PUT

Deliver quote comparison report

Present ranked insurance options with detailed coverage comparison, pricing breakdown, and agent recommendations to customer for decision-making.

AgencyZoom

NowCerts



Outputs

- Multi-carrier quote comparison report
- Customer presentation with coverage recommendations
- Quote tracking dashboard for agents



Key Metrics

- Quote turnaround time
- Quote-to-bind conversion rate
- Number of carriers quoted per request



Tools & Integrations

- AgencyZoom
- Applied Epic
- AMS360
- EZLynx
- HawkSoft
- NowCerts

AI Business OS

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