

navris

NAVRIS Agency Management System (AMS)

Your essential insurance software partner

More AMS Than Ever.

More Than AMS.



MEET THE MOMENT;

Agility for the Modern Agency



- **Navris Core AMS is designed for the modern insurance agency.** Through role-based collaboration, employee tools, reporting, and US based support, Navris's Core AMS solution addresses the acute needs insurance agencies face in today's challenging environment.

Navris AMS is a highly agile and scalable agency management platform that provides integrated data driven analysis and forecasting for business analysts while also providing a seamless experience for customers, advisors, and customer service representatives – no matter where people are located.

- **A NEW NAVRIS FOR A NEW ERA.** Navris Core AMS enables your organization, with out-of-the-box functionality, to plan and manage your operations through advanced forecasting, revenue recognition features, and intelligent automation, while also providing the tools and technology to empower, educate and lead today's agency.

Integrated Features Include:

- **Growth tools:** Leads pipelines to grow your business.
- **Clients:** Built for individuals, employer groups, and associations.
- **Policy Tracking:** Track quotes, applications, in-force policies and renewals.
- **Client Support:** Includes Activity, Cases, ProceduresPlus, & Workflows.
- **Agent/Broker Services:** Integrate in carrier appointments, broker of record tracking, state licenses and industry certifications.
- **Vendor management:** Organize your insurance carriers, products, and contracts.
- **Revenue Recognition:** by policy, by product type, by insurance company, by time frame, and more.
- **Security:** Modern cyber security for today's SAAS based software.
- **Add-ons:** Additional apps and features include client portal applications, policy administration services, commissions, billing, and claims modules. Many third party software integrations, especially within the Microsoft suite of products.

Empowerment, Education & Management for **Today's** Agency Staff and Advisors



EMPOWER GIVE EMPLOYEES AUTONOMY AND FLEXIBILITY NO MATTER WHERE THEY ARE LOCATED.

- **Extensive view of account & benefit Information.** Never be out of the loop or unable to answer a question. Easily view the latest information and be in charge of the situation.
- Flexible user interface to see and act on specific actionable information.
- **Privileges and Roles based:** Each user is granted the ability to see exactly what they need to be successful.
- **Collaborate with your network:** Including your prospects, clients, colleagues, and insurance company partners. Work together in a transparent, collaborative environment and foster a healthy and efficient culture.



Educate THE INSURANCE WORLD IS BROAD AND CHALLENGING. NAVRIS KEEPS IT ORGANIZED AND EASY TO DIGEST AND UNDERSTAND.

- Come up to speed quickly as a new employee or go deeper and become the subject matter expert. Users can easily access insurance company and product information to be an effective source of information.
- The ultimate knowledge base. Effectively use ProceduresPlus to work with confidence. Know you're on the right track.



Manage INTELLIGENTLY MONITOR AND MANAGE TEAMS AND PROCESSES IN THE EVOLVED WORLD OF WORK. The ultimate winner will be your clients!

- Real-Time Adherence (RTA) – Detect and Correct problems immediately!
- PeopleLink – Manage Your Team and Adopt to Changing Schedules. Share Schedules, Calendars, locations, and more: Access them from anywhere and stay connected to your workforce.
- Be connected to your data! Make better decisions for your agency. Know not just where you've been but where your agency is going in the future.



Service and Support: Navris takes a customer-centric approach to providing local service and support, understanding your unique challenges and goals and delivering expertise to keep your agency moving forward.

- **Focused Implementation Support:** A dedicated team of experts, keeping your rollout on-time and on-budget.
- **Ongoing Optimization:** We stay tuned in to your changing needs, helping you maximize the value of your solution as your business evolves.
- **Best Practices:** We understand insurance and technology, and will be your essential insurance software partner.
- **On-Site and Online Training:** From digital guides for new staff to advanced knowledge sharing between users, we can help your team get the most out of the new Navris Core AMS.

Run a Modern Insurance Agency – Transform Your Business



For a demo of Navris Core AMS and to learn more about how Navis is revolutionizing the way agencies engage their customers, visit <https://navris.com>

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Navris is the essential insurance software company that empowers insurance organizations through collaborative interactions. The scalability of our cloud platform allows for quick deployment - and it gives agencies precise control over their internal operations and customer satisfaction levels. Organizations choose Navris because we understand their needs and provide a best-in-class experience, from implementation to ongoing support.

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