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## Forest Agency

### Company snapshot

Founded in 1957, Forest Agency is an independent agency in Forest Park, Illinois that offers home, auto, business, and specialty aviation insurance to the entire state. The forward-thinking agency began using TransactNOW in 2003 and hasn't turned back since. As Forest Agency continues to grow, they rely on TransactNOW to streamline workflows and increase profitability.

**"TransactNOW is so simple. It does all of the work for you."**

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**Cathy Hall,**  
Vice President,  
Forest Agency

# Forest Agency

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**Vertafore® Solutions:**  
TransactNOW®

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## Proven results:

- Cut time spent processing carrier business in half
- Improved new employee ramp-up time
- Increased security to decrease the likelihood of a breach

Forest Agency is well-established, but that doesn't stop them from adopting modern technology, which enables them to improve their business. TransactNOW plays an essential role in this agency's day-to-day operations and improves their overall productivity.

Forest Agency is a family-owned, independent insurance agency offering home, auto, business, and specialty aviation insurance. They have been proudly serving Forest Park, Illinois, and its surrounding communities for 60 years with a culture built on teamwork and a willingness to adopt modern technology.

Vice President Cathy Hall, who recently celebrated her 30-year anniversary with Forest Agency, discovered TransactNOW at a Vertafore user conference in 2003.

As an agency that truly believes in technology and automation, they quickly jumped at the opportunity to leverage TransactNOW in their business. Now, after using TransactNOW for nearly 16 years, Hall says, "I just don't know why you wouldn't use it."

From the moment Forest Agency implemented TransactNOW, it was a vital piece of their software suite and employees instantly noticed significant time-savings in their daily work.



## A manual mess

Accessing information from the multiple carriers they represent used to be a hassle for Forest Agency. In Hall's words, "You would have to open a new browser window, find your password, sign in, and then navigate a complicated, ever-changing carrier website." Manually processing their carrier business certainly wasn't helping their already-heavy workload.

Hall and her teammates experienced immense frustration trying to remember passwords to each carrier website, eventually resorting to sticky notes spread across their desks. Not only did this make finding the correct credentials time-consuming, but it also severely increased the agency's exposure to E&O and security breaches. "It was completely inefficient and certainly not secure," Hall explains.

Rekeying misspelled passwords and clicking through different carrier websites was also a drain on Forest Agency's time — only adding to their list of annoyances with the manual process of connecting to their preferred carriers.

## Faster communication, easier servicing

With TransactNOW, however, Hall and her team were able to use real-time transaction workflows and instantly sign-on to carrier websites without ever leaving their agency management system. "TransactNOW is so simple. It does all of the work for you," Hall says.

"I had no idea how many hours and hours and hours' worth of work TransactNOW would save us."

**Cathy Hall,**  
*Vice President,*  
*Forest Agency*

"With TransactNOW, I click on an icon, I say what I want to do: policy, billing, claims, or endorsement. Then I'm there."

TransactNOW single-handedly cut the time it took to process business with their carriers in half — a noticeable difference that freed up time for Forest Agency to win more new business and provide the advocacy their customers deserve. Hall adds, "I had no idea how many hours and hours and hours' worth of work TransactNOW would save us." No more rekeying login information, clicking endlessly through carrier websites, or security concerns from managing countless credentials.

# Workflow before TransactNOW®

Hall manually connected to each carrier



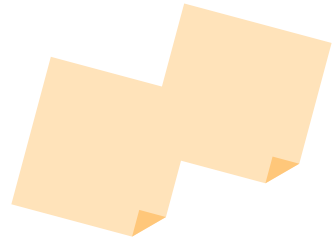
1

Navigated to a new browser window



2

Located login credentials in a pile of sticky notes



3

Searched for the customer on the carrier website and navigated to the corresponding servicing action

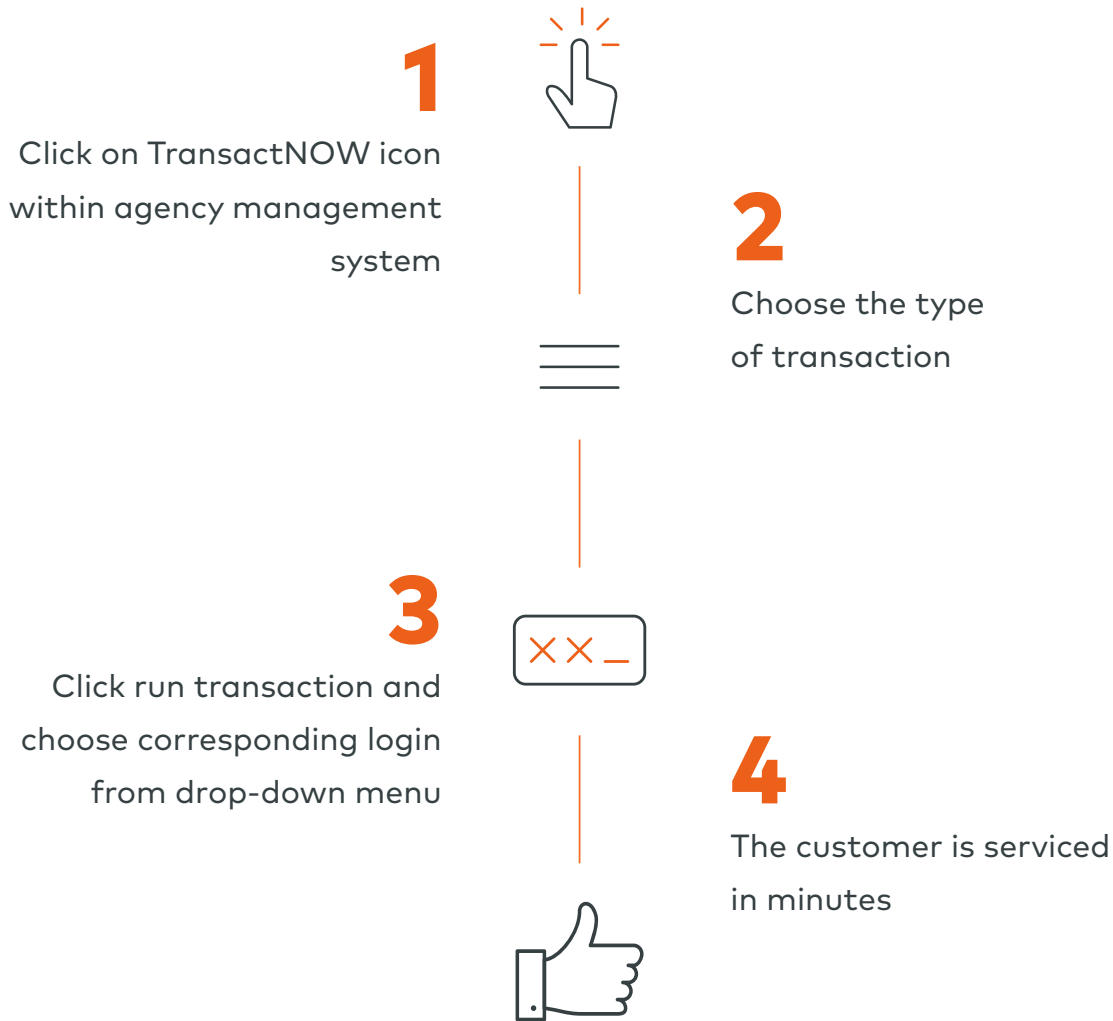


4

After a prolonged waiting period, the customer is finally serviced

# Workflow after TransactNOW®

Hall now has streamlined real-time carrier connections



An added benefit for the fast-growing Forest Agency is that automated carrier connectivity improves their new-hire ramp-up time. "TransactNOW makes it much easier for our new employees to learn things because they don't have to learn how to navigate to all of these different systems," Hall claims. "We're all busy, we're all trying to do more with less time and resources." The less time Hall has to spend on training new employees, the faster they are servicing accounts and making an impact for their customers.

## Connectivity at its best

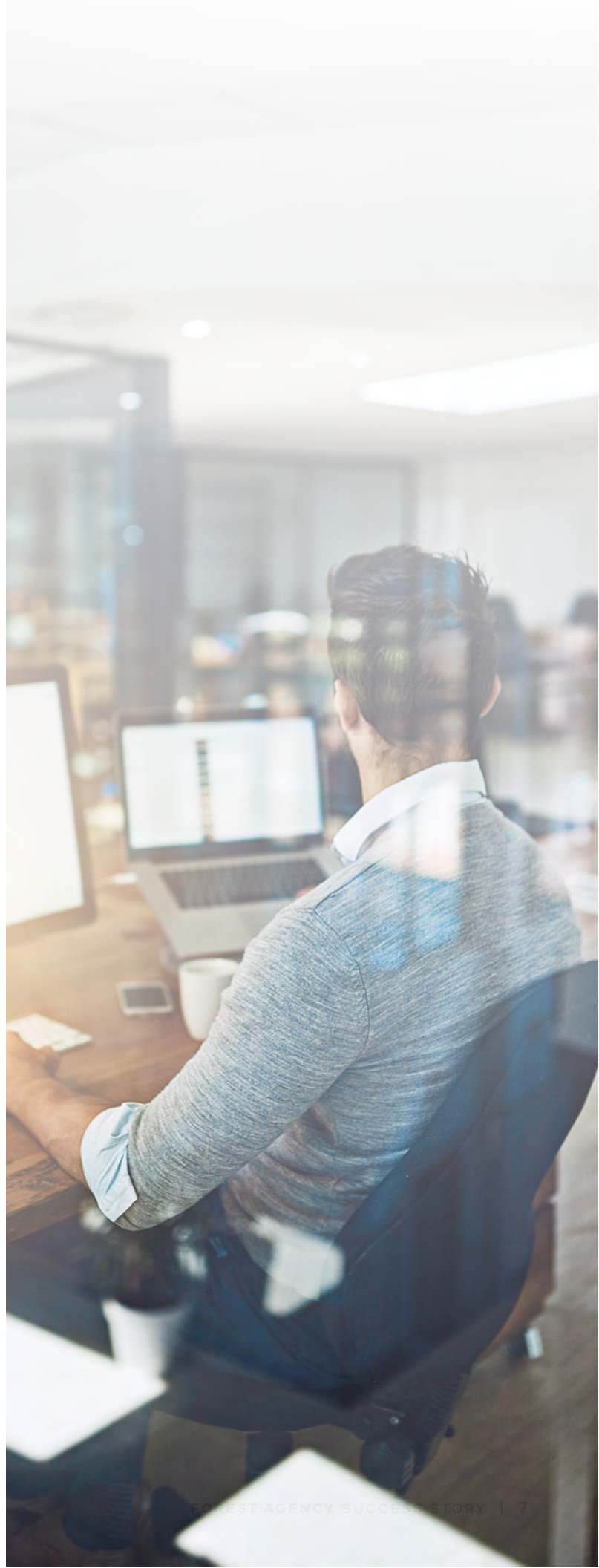
As part of Vertafore's best-in-class platform, TransactNOW streamlines all aspects of carrier-agency connectivity. With TransactNOW you can gain real-time access to carrier documents, speed up service, eliminate data entry for remarketing policies, and simplify credential management. It's designed to help you increase profitability by improving employee productivity and providing a superior experience to each of your customers.

### TransactNOW provides:

- Efficient, single entry transaction processing with multiple carriers
- Real-time access to the most current and accurate customer policy data
- Seamless workflow integration with each carrier website

With TransactNOW you can securely process business with your carriers and service your customers in real time, without ever having to leave your agency management system.

[Learn More](#)





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