Convey Insurance

Program At a Glance

- Online resource center for agency partnerships
- Consolidates important carrier, vendor agency info in one location
- Email engine for updates, messages, newsletters & prospecting
- Online discussion forums
- Reporting to analyze activity on the site

The Convey Insurance program is an online portal designed specifically for agency partnerships. It's branded and customized providing one online location for information, training and important content.

Vendors and carriers update their content catalogs on ConveyInsurance.com, the Hub Site, duplicating information onto one or more agency partnership portals.

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Online Portals for Insurance Agency Partnerships

Convey Insurance program provides online resource centers for property & casualty agency partnerships making it more efficient for thousands of agencies to get carrier and vendor information in a single online location.

Private Site, Restricted Access to Content

Agency producers and staff login to a Convey portal to view content. Content can be segmented by member type so viewers only see content that is relevant to them.

Updated by Carriers & Vendors

Carriers & vendors add content directly into the Convey Insurance site and duplicate it to one or more of the portals they have been invited to join. This keeps the information current and up-to-date.

Email Engine to Update Members

The Convey email engine sends notifications, reminders, custom messages and newsletters to members. Messaging is segmented by member type.

Conduct Email Marketing Technology

Agency producers can subscribe to Conduct™ Campaign Manager and have email campaigns created for them or create their own. Use Conduct to prospect and generate new clients.

Forums

Ask questions to fellow members and receive answers. Great for Market Search, Marketing, and a multitude of discussions.

Sophisticated Administrative Features

Convey has a CRM system to keep track of agency producers and staff. Reports analyze activity on the site and results from Conduct marketing campaigns.

Benefits for Carriers & Vendors

Easy to Manage, Private & Controlled

No need to ask the agency partnership to distribute information by email or on a website. Each catalog is completely private so other carriers and vendors can't access it. Only agency members can view your catalog. Carriers and Vendors can designate content as *"Private"* and only viewable by certain member types, like by state or principals only. You control your catalog to keep agents current on you latest services and products.

Hub & Spoke Model

When you add content to ConveyInsurance.com, you select one or more of the agency partner spoke sites you are connected to for delivery.

Content – What should you include?

- Marketing material, appetite guides, incentives or promotions, training, calendar events, contacts, updates and more.
- Documents, videos, audio files, hyperlinks, banners, pages and forms.
- Add an abridged version of the information that is most important to the viewers of the site and allow them to do a deeper dive by providing hyperlinks.

Reports

Pull analytics to view catalog activity including how many times something was viewed, downloaded, or shared by email.

Participating Agency Partnerships

United Valley INSURANCE SERVICES

SecureRisk® insurance solutions

CAA

KEYSTONE

PIA Professional Insurance Associates

piib The road to independence

P&C Markets Property & Casualty Marketplace