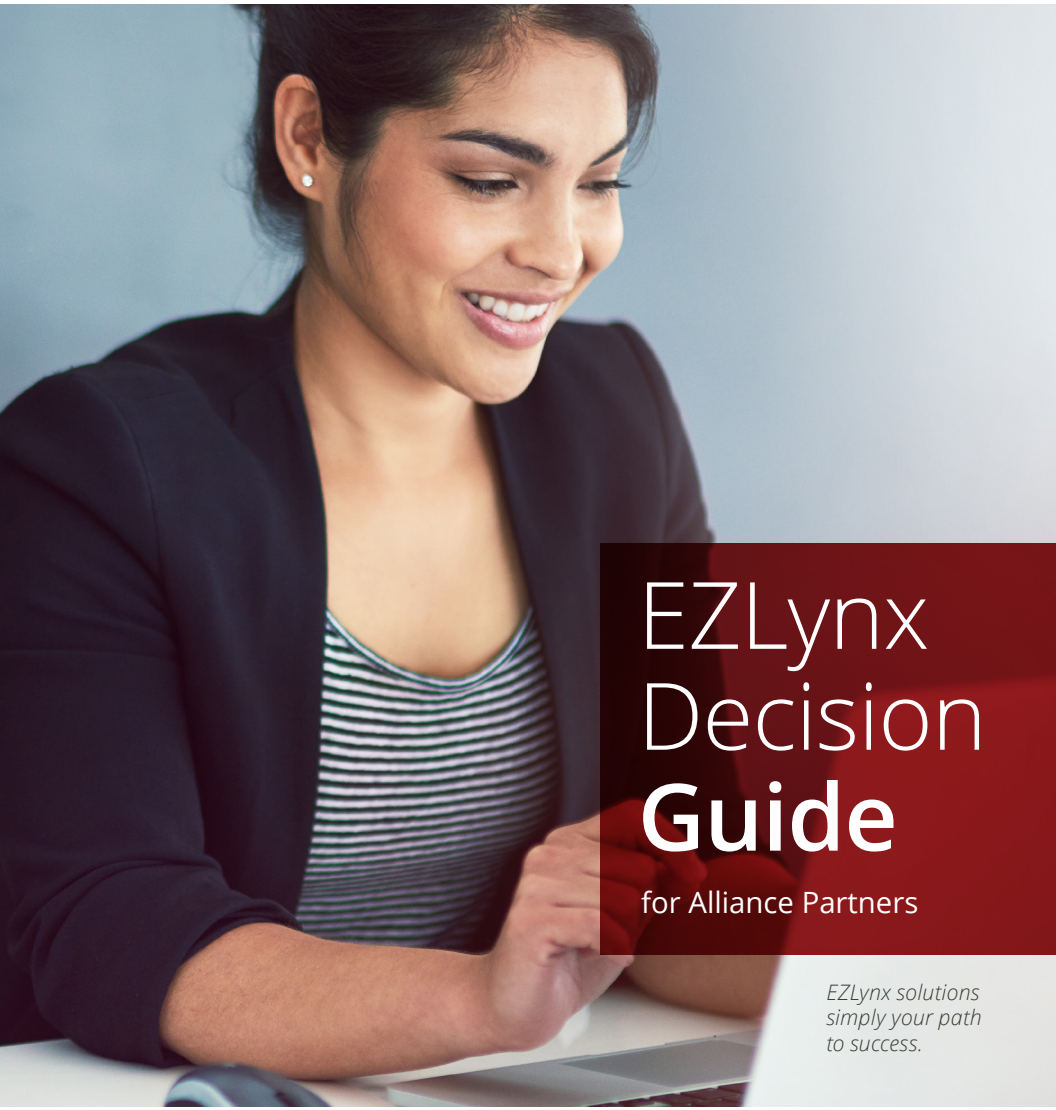
Rating Engine • Consumer Quoting • Management System
Client Center • Communication Center • Agency Websites
Retention Center • Sales Center • Automation Center



EZLynx Decision **Guide**

for Alliance Partners

EZLynx solutions simply your path to success.

Determine Your Needs

Understand The Benefits

	EZLYNX **STANDARD**	EZLYNX **ADVANCED**
RATING ENGINE	✓	✓
Mobile Access	✓	✓
Real-Time Quoting	✓	✓
Carrier Defaults	✓	✓
Auto and Home Pre-fills	25	75
Applicant/Co-Applicant Swap	✓	✓
Quote Templates	✓	✓
Quote Estimator	✓	✓
EZLogin to Quote	✓	✓
EZLynx Connect – Rating Shelf	✓	✓
MANAGEMENT SYSTEM	✓	✓
Agency & Customer Management	✓	✓
Comprehensive Reporting & Analytics	✓	✓
Mobile-Optimized	✓	✓
Policy Downloads	✓	✓
Carrier Messaging with eDocuments	✓	✓
Commerical Quote Tracking	✓	✓
Commercial Policy Entry	✓	✓
Commercial Application Entry	✓	✓
Commercial Application Bundling	✓	✓
Commercial Imports & Exports	✓	✓
Commercial Forms Workflows	✓	✓
Commercial Proposals	✓	✓
Commercial Edit Downloads	✓	✓
Commercial Summary of Insurance	✓	✓
Commercial Certificates Management	✓	✓
Claims	✓	✓
Commissions	✓	✓
Premium Trust Accounting	✓	✓
SUBMISSION CENTER	✓	✓
Appetite Discovery	✓	✓
Risk Data Lookups	✓	✓
Underwriter Management	✓	✓

	EZLYNX **STANDARD**	EZLYNX **ADVANCED**
CLIENT CENTER	✓	✓
Document Sharing	✓	✓
Policy Change Requests	✓	✓
ID Card Access	✓	✓
View Policies	✓	✓
Add Claim Information or Images	✓	✓
Request Certificates	✓	✓
Self-Service Certificates	✓	✓
AUTOMATION CENTER ^	✓	✓
New Customer	✓	✓
Applicant Created	✓	✓
Customer Lost	✓	✓
Policy Cancellation	✓	✓
Note of Cancellation	✓	✓
Policy Change	✓	✓
Additional Policy	✓	✓
Birthday	✓	✓
Sales Center Stages	✓	✓
eSignature Completed	✓	✓
Carrier Notification Received	✓	✓
Carrier Document Received	✓	✓
Claims	✓	✓
Manual Workflow	✓	✓

** Includes 50 envelopes per month, then $0.50 thereafter.*

† EZValue and EZGrowth include up to 500 recipients per campaign, additional fees occur for over 500 recipients.

^ Includes up to 9,999 executions. For 10,000+, overages will apply.

	EZLYNX **STANDARD**	EZLYNX **ADVANCED**
SALES CENTER		✓
Pipeline Management		✓
Detailed Sales Tracking		✓
Automated X-Date Reminders		✓
Lead Tracking		✓
Zapier Integration		✓
Mine Your Data - Agency Insights		✓
CONSUMER QUOTING	✓	✓
Live or Data with Mobile Quoting	✓	✓
Enhanced Quoting		✓
Lead Portal		✓
Google Analytics Access		✓
COMMUNICATION CENTER	✓	✓
Email Campaigns: Drip Campaigns	Unlimited	Unlimited
Email Campaigns: Bulk Campaigns†	Pay per use	Unlimited
Text Messaging (SMS & MMS)	Unlimited	Unlimited
eSignature	50 included*	Unlimited
Postal Mail	Pay per use	Pay per use
EZLynx for Outlook (Desktop and Office 365)	✓	✓
EZLynx Virtual Agent (EVA)		✓
RETENTION CENTER		✓
Predictive Analytics Risk Assessment		✓
Premium Change Summary		✓
Policy Comparison		✓
Renewal Notification		✓
Historical Premium Changes		✓
Commercial and Personal Lines		✓

	EZLYNX **STANDARD**	EZLYNX **ADVANCED**
AGENCY WEBSITES	✓	✓
Mobile Optimized	✓	✓
Website Editor	✓	✓
Design Choices	✓	✓
Number of Pages	4	4
SSL Certificate	✓	✓
TRAINING	✓	✓
EZLynx University	✓	✓
Live Group Training	✓	✓

UPGRADE YOUR WEBSITE

SILVER AGENCY WEBSITE (UPGRADE)	GOLD AGENCY WEBSITE (UPGRADE)
Mobile Optimized	All Silver Options, plus:
Website Editor	
26 Design Choices	Local SEO
15 pages	Local Reach
8 unique website articles	Social Reach
AgentInsure Lead Network	Performance Reviews
3 Lead Capture Forms	Blogs
Multilingual	
Dedicated Website Consultant	
SSL Certificate	

Additional fees may apply for product setup, data conversion or other services performed by EZLynx.

Understand The Benefits

All **EZLynx® Products** have a multitude of individual benefits. Check out a few of the major benefits for each product below and see how each can impact your bottom line.

Rating Engine

The leading real-time comparative quoting tool for home and auto insurance.

Consumer Quoting

Introduce the online insurance shopper to your agency.

Management System

Retain current customers while acquiring new business.

**Boost revenue and productivity with our Retention Center add-on*

EZLynx Accounting

Simplify the management of your money.

Client Center

Deliver superior customer service 24/7.

Agency Websites

Establish a local web presence.

Communication Center Products:

Marketing Campaigns

Drip and Bulk: Drive sales and improve customer retention.

EZLynx for Outlook

Connect, view, share, and update with the plug-in for Microsoft Outlook.

Agency Pulse

Business insights delivered via monthly emails with EZLynx Agency Pulse. The automated agency report aggregates data from EZLynx Rating Engine and EZLynx Management System into easily readable charts, allowing principals to make targeted, and educated business and marketing decisions.

SNAPSHOT KEY AGENCY METRICS AT-A-GLANCE

Name	Value	Change
Total Annual Premium	$1,440,871	$29,690 ▲
Total Active Policies	1,211	19 ▲
Total Active Customers	857	16 ▲
Average Policies per Customer	1.41	-0.01 ▼
Average PL Policy Premium per Customer	$1,633	5 ▲
Average CL Policy Premium per Customer	$3,008	16 ▲
Average Policy Premium per Customer	$1,681	3 ▲
Personal/Commercial Premium Split	93:7	0:0
90 Day Average Close Ratio for Auto	57.06%	-1.10 ▼
90 Day Average Close Ratio for Home	36.09%	2.41 ▲
90 Day Average Carrier Retention Auto	87%	1 ▲
90 Day Average Carrier Retention Home	91%	3 ▲
90 Day Average Agency Retention Auto	89%	0
90 Day Average Agency Retention Home	89%	5 ▲
Customers With Email Address	52.71%	0.08 ▲
Prospects With Email Address	47.08%	-0.72 ▼