



EZLynx[®] Decision Guide



EZLynx solutions simplify your path to success.

EZLynx Management System[™] | EZLynx Agency Websites[™]

EZLynx Consumer Quoting[™] | EZLynx Sales Center[™] | EZLynx Rating Engine[™]

EZLynx Submission Center[™] | EZLynx Agency Accounting[™] | EZLynx Client Center[™]

EZLynx Communication Center[™] | EZLynx Automation Center[™]

Retention Center[®] | EZLynx Reporting & Analytics[™] | Applied Pay[®] | Tarmika[™]

Determine your needs. **Understand** the benefits.

Understand the Benefits

Our vision at EZLynx is to provide you a single, integrated platform with product capabilities that deliver benefits at each stage of the policy lifecycle. Check out a few of the major benefits for each capability below and see how each can impact your bottom line.



EZLynx Management System™

Maintain a single view of your book of business and manage all stages of the policy lifecycle via our integrated Centers and capabilities in one system.



EZLynx Agency Websites™

Establish a local web presence.



EZLynx Consumer Quoting™

Introduce the online insurance shopper to your agency.



EZLynx Sales Center™

Streamline and strengthen your sales pipeline to close more business.



EZLynx Rating Engine™

Quote home and auto insurance quickly with the most widely used comparative PL quoting tool.



EZLynx Submission Center™

Optimize commercial submissions with a centralized hub to organize, track and bind.



EZLynx Automation Center™

Automate routine workflows and trigger common tasks to operate more efficiently.



Retention Center®

Keep more clients with a comprehensive, proactive retention process.



EZLynx Agency Accounting™

Simplify the management of your money.



EZLynx Communication Center™

Market to your customers and prospects at the right time with the right message through drip and bulk email sends. Connect, view, and share emails via pre-built plug-ins for Outlook® and Gmail®.



EZLynx Client Center™

Meet your customers online 24/7 with a portal designed for you.



EZLynx Reporting & Analytics™

Make data-driven decisions for greater growth and profitability.

Keep a Pulse on Your Agency

Business insights delivered via monthly emails with 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 ▼

EZLYNX STANDARD EZLYNX ADVANCED

EZLYNX 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	✓	✓

EZLYNX MANAGEMENT SYSTEM™

	✓	✓
Agency & Customer Management	✗	✗
Comprehensive Reporting & Analytics	✗	✗
Mobile-Optimized	✗	✗
Policy Downloads	✗	✗
Carrier Messaging with eDocuments	✗	✗
Commercial 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	✗	✗

EZLYNX SUBMISSION CENTER™

	✓	✓
Appetite Discovery	✓	✓
Risk Data Lookups	✓	✓
Underwriter Management	✓	✓

EZLYNX STANDARD EZLYNX ADVANCED

EZLYNX CLIENT CENTER™

	✓	✓
Document Sharing	✓	✓
Policy Change Requests	✓	✓
ID Card Access	✓	✓
View Policies	✓	✓
Add Claim Information or Images	✓	✓
Request Certificates	✓	✓
Self-Service Certificates	✓	✓

EZLYNX AUTOMATION CENTER™ ^

	✓	✓
New Customer	✗	✗
Applicant Created	✗	✗
Customer Lost	✗	✗
Policy Cancellation	✗	✗
Note of Cancellation	✗	✗
Policy Change	✗	✗
Additional Policy	✗	✗
Birthday	✗	✗
EZLynx Sales Center™ Stages	✗	✗
EZLynx 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+, averages will apply.

EZLYNX STANDARD EZLYNX ADVANCED

EZLYNX SALES CENTER™

Pipeline Management	✓
Detailed Sales Tracking	✓
Automated X-Date Reminders	✓
Lead Tracking	✓
Zapier® Integration	✓
Mine Your Data - Agency Insights®	✓

EZLYNX CONSUMER QUOTING™

Live or Data with Mobile Quoting	✓
Enhanced Quoting	✓
Lead Portal	✓
Google® Analytics Access	✓

EZLYNX COMMUNICATION CENTER™

Email Campaigns: Drip Campaigns	Unlimited	Unlimited
Email Campaigns: Bulk Campaigns¹	Pay per use	Unlimited
Text Messaging (SMS & MMS)	Unlimited	Unlimited
EZLynx 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

EZLYNX AGENCY WEBSITES™

Mobile-Optimized	✓	✓
Website Editor	✓	✓
Design Choices	✓	✓
Number of Pages	4	4
SSL Certificate	✓	✓

TRAINING

EZLynx University	✓	✓
Live Group Training	✓	✓
Personalized Training		✓

ADD MORE DIGITAL CONNECTIVITY TO YOUR BUSINESS

TARMIKA™ (UPGRADE)

- Submit CL policies to multiple carriers with a single submission
- Bridge to insurer portals
- Compare commercial coverage options
- Understand in-market appetite
- Pre-fill ACORD forms

APPLIED PAY® (UPGRADE)

- EZLynx integration
- Payment reconciliation
- Next-day funding
- Automated notifications for payment
- Multiple payment methods (ACH, credit card, etc.)
- Agency-branded payment hub

UPGRADE YOUR WEBSITE

SILVER AGENCY WEBSITE (UPGRADE)

- Mobile-Optimized
- Website Editor
- 26 Design Choices
- 15 Pages
- 8 Unique Website Articles
- AgentInsure® Lead Network
- 3 Lead Capture Forms
- Multilingual
- Dedicated Website Consultant

GOLD AGENCY WEBSITE (UPGRADE)

- All Silver Options, Plus:
- Local SEO
- Local Reach
- Social Reach
- Performance Reviews
- Blogs

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