



**More Than a Rater:
Discover What Makes
EZLynx an Agency's Most
Productive Employee**

An EZGuide



Introduction

For independent insurance agents, the name EZLynx often brings to mind our flagship product, our industry-leading comparative rating tool. While EZLynx Rating Engine™ is the most used solution for delivering accurate, real-time quotes across multiple carriers, it's just scratching the surface of what EZLynx can do.

EZLynx is much more than a rater; we also offer an all-in-one agency management system designed to meet the unique challenges of modern insurance agencies. From managing the complete policy lifecycle to enhancing customer engagement, streamlining workflows, and driving agency growth, EZLynx combines advanced technology and innovative features into a single platform.

If you've been thinking of EZLynx as "just a rater," this EZGuide is here to expand your perspective, helping you discover how EZLynx simplifies the daily operations of running your agency while boosting productivity and profitability. Let's look at the full suite of features that make EZLynx the ultimate all-in-one agency management solution for independent agents.

The Evolution of EZLynx from Rater to All-in-One AMS Solution

When EZLynx first entered the market, it revolutionized comparative rating for independent agents, allowing them to provide clients with accurate quotes from multiple carriers faster than ever before. While this groundbreaking tool remains at the heart of the EZLynx ecosystem, the platform has evolved in exciting ways over the years.

Today, EZLynx offers much more than a comparative rater.

The foundation of the EZLynx platform is now our cloud-based management system, an intuitive, easy-to-use, all-in-one solution with embedded capabilities that help start-up and growth-minded agencies drive productivity and growth. Whether you're processing renewals, tracking leads, or managing policy documents, everything you need is centralized in a single place. While some AMS vendors claim they offer "integrated solutions," EZLynx truly is, with all features natively built-in versus separate, cobbled-together integrations.



In 2024, twice as many independent agencies chose EZLynx compared to the combined total of all our competitors.

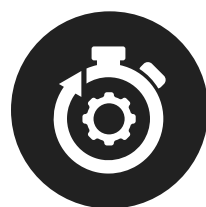
The Evolution of EZLynx from Rater to All-in-One AMS Solution

Key Benefits of EZLynx Management System™ Include:



Simplified Insurance Agency Management

Streamline and strengthen the way your staff works together each day. Agency-wide collaboration tools are built right into the system, and reports and dashboards provide high-level views of the activities and completion rates that impact client experiences and your agency's profitability. Your agency has weighty performance goals; EZLynx can monitor, measure, and track these growth targets to completion.



Improved Efficiency

Drive efficiency by leveraging one system to manage new applications, quote, create proposals, and complete ACORD forms and certificates. You'll avoid the pain of managing paper and rekeying data across different software tools and empower your staff to enhance how they service clients. Even small minutes saved each day add up to huge time savings, which you can reinvest in revenue-generating activities and meaningful customer touchpoints.

"If I had to describe EZLynx in one word, I would probably say unified. It's one unified platform an agency can use to find solutions for whatever their agency needs."

Luke Royal, Smart Choice Regional Director

Quote may have been edited for clarity.

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The Evolution of EZLynx from Rater to All-in-One AMS Solution



Increased Growth and Profitability

Automate and accelerate your agency workflows to lower operating costs and free up time to focus on selling. Native personal lines and commercial lines rating and quoting tools make accessing markets quicker and growing your book across more lines of business easier. Automatically generate potential prospects from your quote data and book of business, along with the information needed to recapture, re-engage, or cross-sell before the X-Date. By managing clients through the complete customer life cycle within a single application, you keep your total technology expenses down while your sales opportunities go up.



Strengthened Value Proposition

Stay competitive with an omnichannel approach for policy issuance and servicing. A robust set of communication and self-service tools allows your insureds to get service at their convenience. With a customer portal, insureds can access policies, generate certificates, submit change requests, view ID cards, follow claims, share documents and more anywhere, anytime. Deliver the modern experience today's insurance shoppers expect.

“I chose EZLynx because they checked all my boxes. I had the chance to shop around, but no one else offered the complete picture. They're affordable, value relationships, and are ready to grow with you.”

Emily Wycpalek, Ground Up Insurance Co-Founder

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What's In Our Management System?

Our agency management system seamlessly integrates advanced features and tools to cover every aspect of agency operations, including:



Rating and Submissions



Sales and Marketing



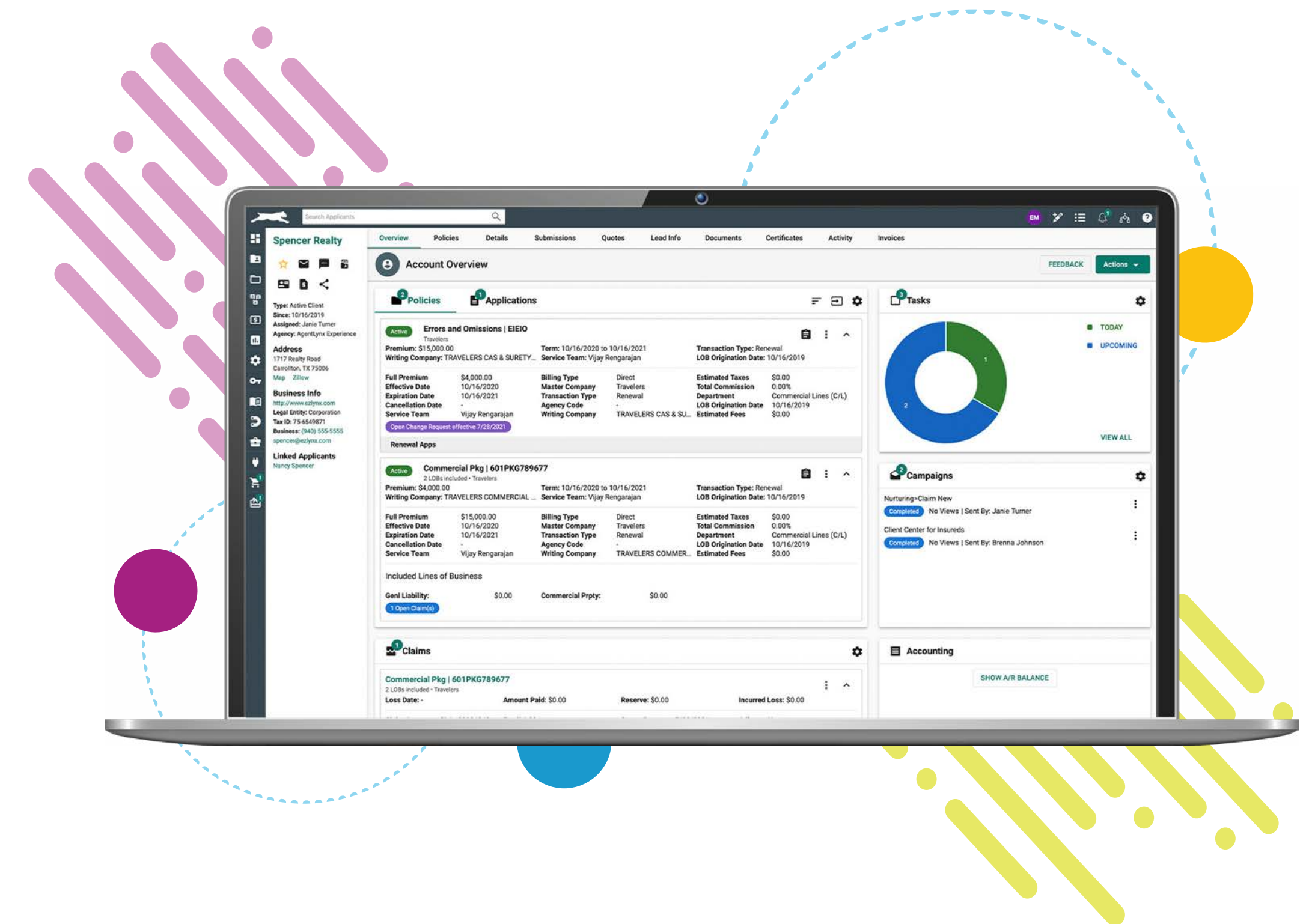
Servicing and Policy Management



Renewals and Client Retention



Payments and Accounting

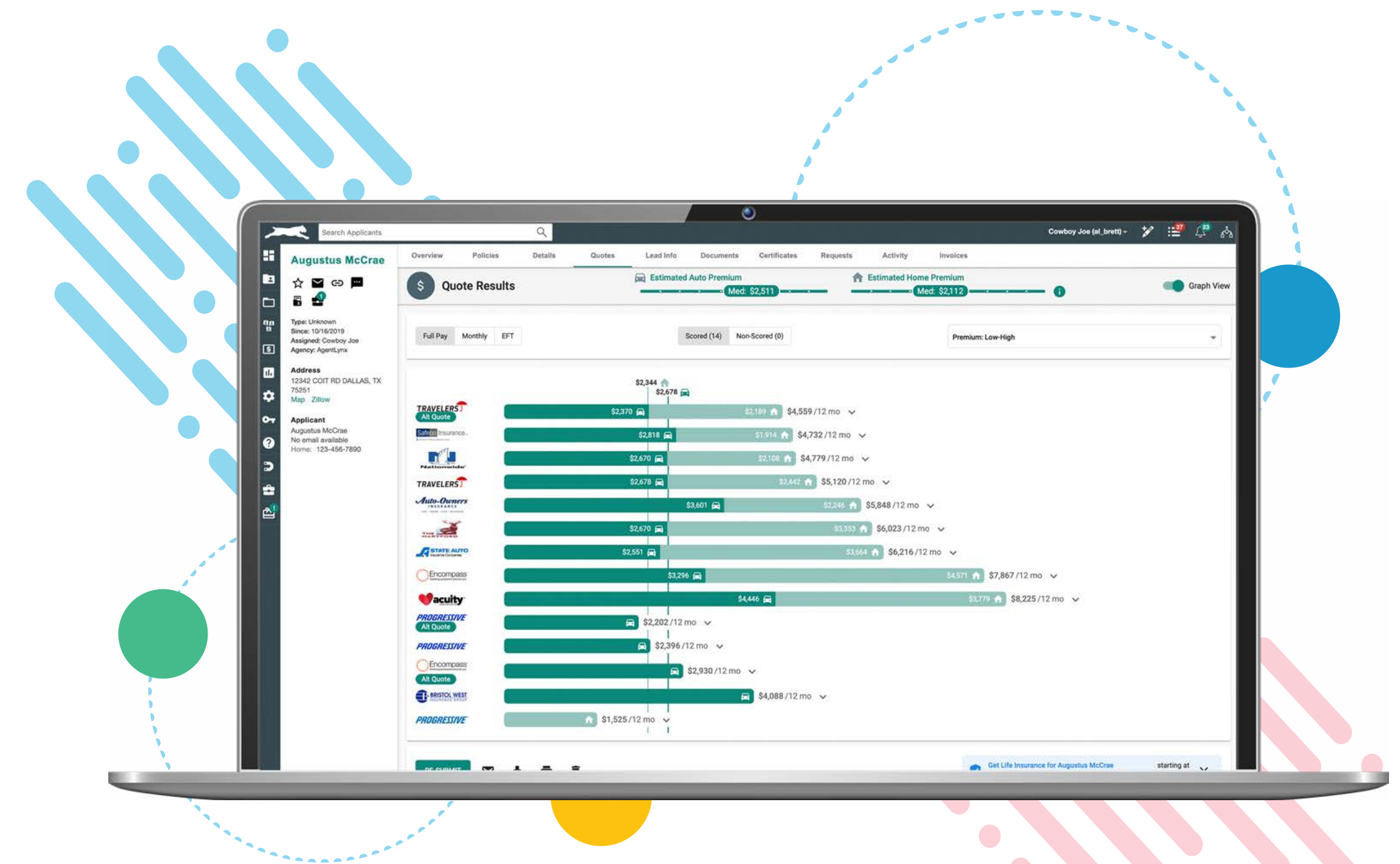


Native Rating and Submissions

Efficiency isn't optional for growing agencies; it's essential. Your clients expect speed, accuracy, and seamless service. Yet, too often, independent agents face roadblocks like juggling multiple carrier systems, repetitive data entry, and clunky commercial lines submission processes that drain time and resources. These inefficiencies impact profitability long before a quote is even delivered. It's time to eliminate the friction and focus on what drives your agency forward.

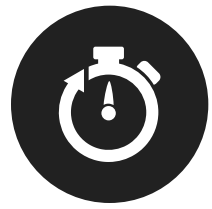
Home and auto insurance shoppers demand fast, competitive quotes from multiple carriers, and EZLynx delivers. With just one entry of applicant data, you can instantly generate real-time quotes across multiple carriers. The EZLynx comparative rating workflow is built for speed and simplicity and is packed with intuitive features that empower your agency to quote more and faster. No duplicate entry, no wasted time – just streamlined cross-carrier quoting made easy.

An all-in-one Rater + Management System means all your data is in one place. You won't have to import, export, or manually transfer data from one piece of software to another.



Native Rating and Submissions

EZLynx gives you:



Access to Real-Time Quotes

Compare personal lines quotes from hundreds of carriers across 48 states.



Prefilled Auto Details

Streamline quotes with prefilled vehicle and driver information for auto insurance quotes.



Anytime, Anywhere Quoting

Generate quotes seamlessly on any mobile device – even your phone!



More Lead Capture

Engage prospects with innovative consumer-facing online tools.



Streamlined Centralized Data

Make quick work out of remarketing, account rounding and pursuing business you didn't win the first time.



Enhanced Client Conversations

Coverage/premium breakdowns make customer conversations more meaningful.

Native Rating and Submissions

Looking to grow your commercial lines business? With EZLynx, you can move faster and work smarter. Guided workflows and intuitive tools simplify preparing, organizing, and tracking all commercial submissions. EZLynx takes out commercial lines guesswork, eliminating duplicate data entry, reducing errors, and saving valuable time. Empower your agency to seize commercial insurance opportunities with greater speed and profitability because success starts with efficiency.

“You can be like any other agency out there, or you can set yourself apart by buying the right technology and the right platform. Buying something like EZLynx can help you achieve those goals and set yourself apart from all the other agencies out there.”

Beaux Pilgrim, Reed Insurance Principal

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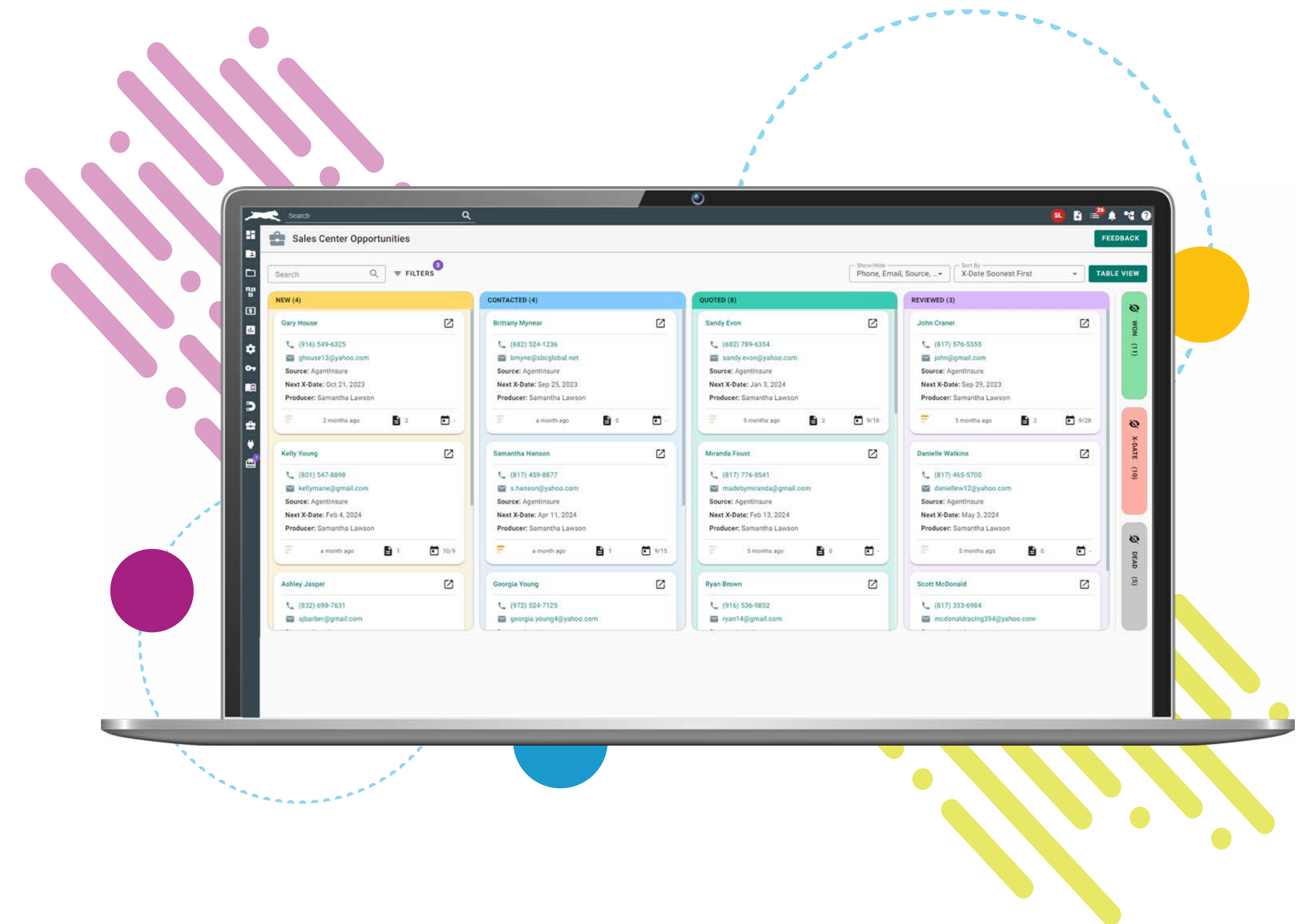
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Sales and Marketing

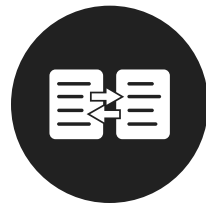
Your sales pipeline deserves efficiency, not friction. If you're juggling legal pads, spreadsheets, or scattered software for leads and customer data, you're losing time – and business – to competitors who automate their processes.

EZLynx simplifies sales with an insurance-specific CRM built into our all-in-one AMS. Instantly access customer details, interaction history, and policy info in one centralized hub. By eliminating fragmented data, you'll work smarter, improve accuracy, and gain everything you need to qualify, sell, and close faster. Plus, revisiting missed opportunities or rounding out accounts has never been easier. It's the smarter way to grow your agency.



Sales and Marketing

EZLynx gives you:



Intelligent Lead Imports

Use automation to qualify prospects and move them into your sales pipeline quickly.



Automatic Data Mining

Tap into previous quote data and your existing book of business to find timely prospects, cross-sell, recapture lost business and reengage past leads.



Real-Time Pipeline Visibility

Monitor your sales pipeline's health and analyze market factors and producer results from one centralized hub.



Pre-Built Sales Automation Templates

Maintain client engagement throughout the funnel and guide them through next steps effortlessly.



Automated Client Communications via Preferred Channels

Automate text and email communications, including text attachments like images or videos.



Interactive Quote Proposals

Deliver engaging quote proposals, enabling consumers to accept coverage or request changes, with personalized video messages highlighting your agency's value.



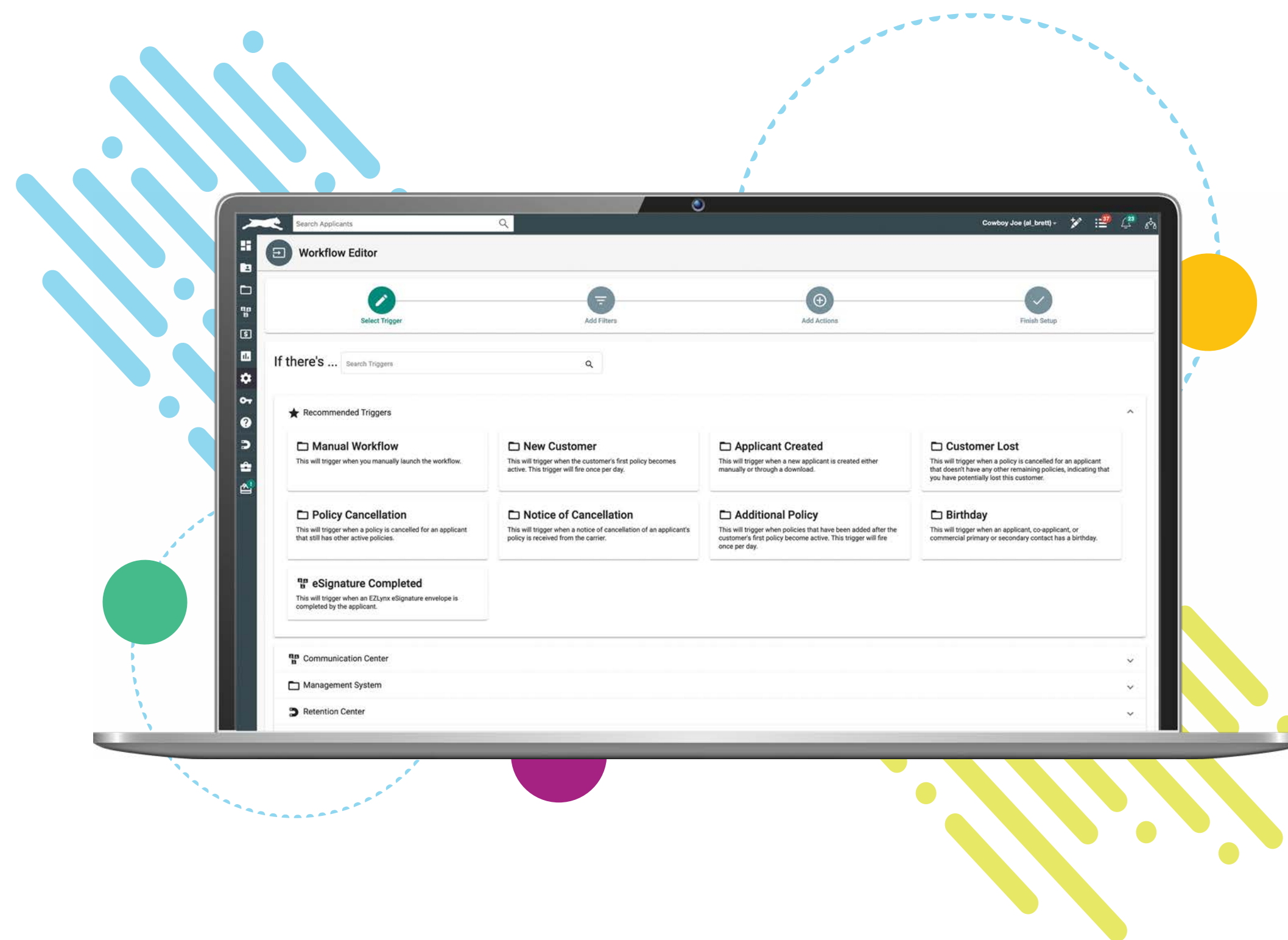
Servicing and Policy Management

As your book of business grows, so do the demands of servicing your clients. Without the right tools, your agency risks focusing too much on managing existing accounts and missing out on opportunities to bring in new business. That's why EZLynx is built to streamline workflows, improve operational efficiency, and deliver the exceptional customer experience your clients expect.

EZLynx is a centralized hub for your agency – giving you a single view of each client and your entire book of business. It simplifies connections with insurers through policy downloads and eDocs while empowering your team to manage clients seamlessly across every step of the insurance lifecycle.

Automation with EZLynx is the key to scaling for growth. It maximizes your team's efficiency, ensures consistent best practices, and frees up valuable time for revenue-generating activities. With your agency operating more smoothly, you can focus on growing your business.

Plus, with EZLynx, your agency is always open – 24/7/365 – because that's what today's consumers expect.



Servicing and Policy Management

EZLynx gives you:



Automated Workflows

Automate repetitive and time-consuming tasks. Define triggers, and let the system handle the rest – saving you time and improving customer experiences.



Convenient Customer Self-Service

Empower clients with an online portal to access policies, generate certificates, submit change requests, and track claims anytime, anywhere.



Client Interaction Records

Automatically log client communications for enhanced transparency and E&O protection.



Seamless Document Management

Centralize, organize, and share key files directly within the platform.



Reporting Tools

Track KPIs at a glance, analyze performance, and make data-driven decisions to drive profitability.



Renewals and Client Retention

Today's consumers are shopping for insurance like never before, and your agency needs the right tools to safeguard your clients' interests and protect your book of business. Customers often assume better deals are just around the corner. It's your job to show them that your agency is their trusted advisor to help them find the right coverage at the right price.

The key to retention is staying ahead of the curve by resolving issues before they arise. This requires a proactive, repeatable process that scales across your entire book of business. When you streamline your customer renewal process effectively, retention becomes the foundation for long-term growth.

EZLynx puts retention on autopilot. Our patented retention process prioritizes at-risk policies, summarizes premium changes, and uses automation to ensure that 100% of renewals are handled efficiently. The result? Lower churn, happier clients, and a more successful agency.



Renewals and Client Retention

EZLynx gives you:



Risk Modeling

Use predictive analytics to identify high-risk policies and compare renewals side-by-side in seconds, eliminating manual dec page reviews.



Automatic Remarketed Rate Retrieval

Instantly retrieve rates for at-risk renewals, saving up to 15 minutes per policy.



Client Renewal Reminders

Simplify renewals with automated policy review reminders via your customer portal, ensuring a low-touch, client-driven process.



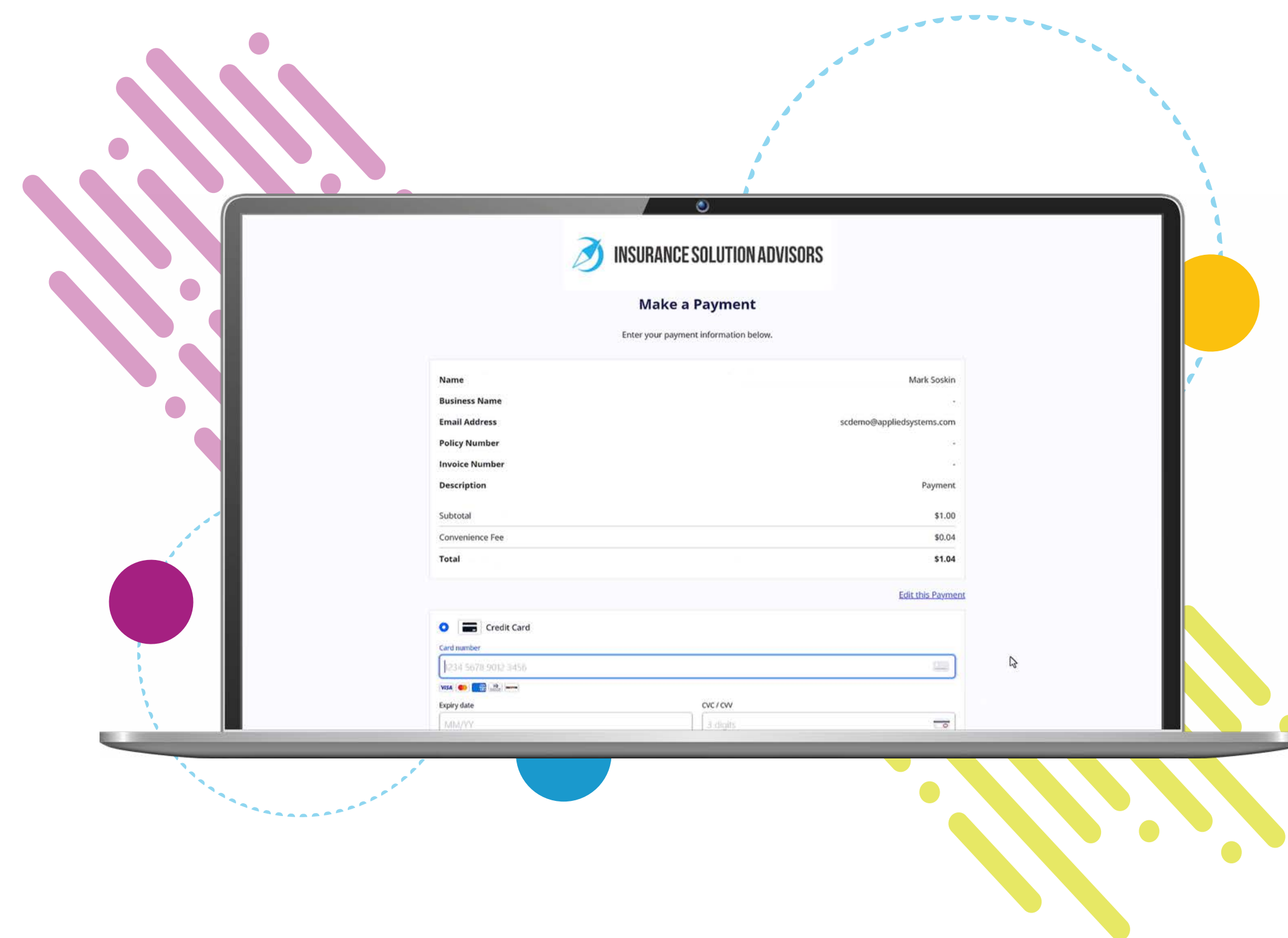
Increased Retention Rates

Increase agency retention by an average of 8 percentage points with EZLynx's patented process.

Payments and Accounting

Your accounting system should work as hard as you do. EZLynx simplifies every step with an intuitive interface designed for efficiency and ease of use. Automate receivables, streamline commission reconciliation, and track balances and payables, all in one integrated solution that saves you time and effort.

Customers expect digital payment options; nine out of 10 use them regularly. Don't let outdated payment methods make your agency seem less modern or secure. With EZLynx, you can deliver the convenient, seamless experiences your clients demand while keeping your agency ahead of the competition.



Payments and Accounting

EZLynx gives you:



Automated Accounting

Save time by replacing spreadsheets with an accurate, automated policy-specific accounting system.



Simplified Commissions

Eliminate manual entry and calculation. EZLynx delivers a better, automated way to create commission reports.



Convenient Payments

Offer clients the convenience of making payments through your customer portal, whether agency or direct bill.

- **Versatile Platform:** **Applied Pay**[®] is the insurance industry's leading digital payments solution and seamlessly integrates with EZLynx.
- **Customer Portal:** Let insureds handle payments directly through your portal, not the carrier's.



Profitability Insights

Get a 360° view of your agency's finances with advanced reporting to monitor trends and act swiftly.

Conclusion

Awesome! You've made it to the end. Let's review the most important points:

- Historically, EZLynx has been known for our industry-leading comparative rater, EZLynx Rating Engine. But we're so much more.
- EZLynx is a true all-in-one agency management solution that seamlessly integrates advanced features and tools to cover every aspect of agency operations, including Rating and Submissions, Sales and Marketing, Servicing and Policy Management, Renewals and Client Retention, and Payments and Accounting.
- Agencies benefit from using the EZLynx Management System with:
 - Simplified agency management
 - Improved efficiency
 - Increased growth and profitability
 - Strengthened value proposition
- EZLynx has everything your agency needs to thrive.
- If you want a competitive edge, make EZLynx your most productive employee

Get Started Today

Ready to discover all that EZLynx offers? Start by exploring its comprehensive features and capabilities in action.

Visit www.ezlynx.com or call **(877) 932-2382** to learn more, request a demo, or take advantage of special pricing for a limited time. Now is the perfect moment to transform your agency with EZLynx!