

FORT WORTH, TEXAS--InsureZone announces the addition of two new tools to its FIDO CRM platform which is the operational backbone of some of the largest agencies, wholesalers and brokers in the country.

“The Service Dashboard and Fetch are the latest additions to our FIDO platform, said John Pergande CEO. These two tools have cut the time it takes our staff to handle service requests and to complete its daily download work by over 70% and they are now ready for our tech customers.”

The Service Dashboard allows an agency to receive and manage all service request types online. The service interface collects information specific to carrier, line of business, and request type. This tool allows real-time tracking of these requests on your agency portal and includes email and chat functionality along with the automated delivery and storage of evidence documents. In addition, each service request is assigned to a CSR via customizable rules and creates a work queue for each service person.

The Fetch software is a program that logs into carrier web sites and “fetches” and delivers documents to any recipient via email. When integrated with the Service Dashboard, Fetch has the ability to programmatically complete the document retrieval, delivery and storage portion of a service request. For a high volume agency, MGA or broker, Fetch can be used in batch mode to complete the thousands of document retrieval tasks that an agency has to complete each day. And when a document is not ready, the tool knows to programmatically try again for up to two weeks and notifies the assigned CSR if a matching document cannot be found.

“Again, InsureZone is at the forefront of insurance technology. Our tech team routinely looks beyond the current set of capabilities in our software, said Pergande, continually tweaking and enhancing its functionality to improve the user experience and help reduce manual work. These updates will enable agencies, brokers and wholesalers to dramatically reduce costs and increase service efficiency. ”

InsureZone is a holding company that has a unique combination of insurance services and software development that is dedicated to implementing the best methods for selling and servicing an insurance policy. The company operates in four areas of the insurance world: Software Development and Licensing, Wholesaling, Retail Agencies and Comparative Rating. The InsureZone platform allows online submissions and real-time rating for personal, commercial and surplus lines.

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