



Vertafore™

Unleash your potential

ImageRight

Guaranteed Success Package (GSP)

Factsheet

About Vertafore

Vertafore is the leading provider of software, services, and information to the insurance distribution channel including independent agents, brokers, MGAs, carriers, and reinsurers. Vertafore leverages a unique industry presence to deliver meaningful solutions, powerful technology, critical information, and robust insights to help organizations effectively respond to business challenges and capture new opportunities. Vertafore solutions have helped more than 15,000 customers and 200,000 users gain competitive advantage to accelerate their business performance.

Why Vertafore

Vertafore brings together a family of connected technology and information solutions, enabling us to provide clear paths to competitive advantage and growth for all our customers. Vertafore is committed to helping our customers capture opportunities for increasing productivity, efficiency, ROI and growth – unleashing the full potential of their business. Vertafore solutions connect agencies, carriers and MGAs to work together towards a common mission to grow the bottom line and better serve the needs of their clients.

The Vertafore Team

- Privately-held by JMI Equity and Hellmann & Freidman LLC
- 1100+ Employees
- 43% of employees focus on R&D
- 30% of employees focus on implementation and support
- Deep insurance expertise
- Commitment to client success

Vertafore

Carrier & MGA Markets

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Success May Not Be Simple. But Our Belief Is.

We believe that by dedicating ourselves to one vertical niche, we're able to offer our customers the ease and cost-effectiveness of an off-the-shelf product with parameters flexible enough – and capabilities comprehensive enough – to meet the requirements of carriers, brokers, MGAs, and retail agents.

By adhering to that belief, we've made ImageRight the best content-management system on the market. And by developing a seven-stage implementation approach that eliminates risk for our customers, we've found a way to share our success with them.

GSP Implementation

While every company requires a unique implementation plan, we've fine-tuned our approach such that the expectations of users, management, and IT can be met, even as the company continues to conduct everyday business. We only claim success if go-live dates are met, budgets are met, and expectations are met or exceed. And we always succeed – or your money back.

Expectation Meeting

- Define File Structures and Workflows
- Develop Statement of Work
- Set Tentative Implementation Dates

System Design and Preparation

- Order Hardware
- Design File Structures and Workflows
- Finalize Project Requirements and Timeline

Test Lab

- Hands-On Review of File Structures and Workflows
- Verify Status of Hardware Orders
- Confirm Users for Training and Go-Live

System Finalization and Life Line

- Confirm Prerequisites and Database Setup
- Remotely Install Scripts and Base Components
- Configure Basic System Requirements

Hardware Week

- Install Specialty Hardware
- Train System Administrators
- Train Scanner Operators and Begin Backscanning

Training and Go-Live

- Train Users
- Finalize Procedures
- ImageRight in Production

Project Recap

- Ensure 100% Raving Fans
- Answer Follow up Questions
- Address Follow up Issues