



# Partner

## Partner XE™ Making a Difference

Through Partner XE, SIS provides a scalable and affordable approach that enables insurance agencies to grow within their system.

### Our History

In 1995, a team of developers at State Auto Insurance created the Partner agency management system to meet the needs of the State Auto agents. As a result, Strategic Insurance Software was established as a separate department of that major carrier. Recognizing the potential of the software and the growing need within the industry, SIS was spun off as a separate private business unit. Today, SIS is managed by the unparalleled business team at NuGrowth Solutions, and maintains its excellent relationship with StateAuto and their agents.

### Our Mission

Our mission is to help independent insurance agents grow their business with innovative and robust technology. We are committed to providing a state-of-the-art agency management system that meets the specific needs of the independent agent, and ensures excellent integration with carriers.

### Our Core Values

Our customers deserve the best product and the best service. Our products are backed by an experienced staff dedicated to being there when you need them. Our Columbus, Ohio, based service team, comprised entirely of highly trained customer service personnel, knowledgeable insurance professionals, and expert technical specialists, sets the bar high because you deserve the best.



simple.innovative.secure

*Easy Navigation, Quick Carrier Connections  
& Best in the Business Outlook Integration*

### Our Award Winning Technology

As a result of our dedication to independent insurance agents' success, we have received 27 ACORD awards for Excellence in Technology over the past several years – more than any agency management vendor of our size.

### Partner XE – Agency Management

Through our flagship product, Partner XE, we provide an innovative and robust agency management system for independent agencies. Partner XE incorporates Real Time functionality, streamlines business operations and helps manage all areas of an agent's business – customers, policies, claims, scheduling, accounting and more. Through Partner XE, SIS provides a scalable and affordable approach that enables insurance agencies to grow within their system, rather than migrate through multiple systems as their business expands.

Partner XE. A simple, innovative, secure way to:

- Grow Your Business
- Manage Workflow
- Enhance Customer Service
- Connect With Carriers
- Go Paperless
- Increase Data Security
- Streamline Accounting

### Streamline Your Operations

Contact SIS Today!

1-800-747-9273

[sales@sisware.com](mailto:sales@sisware.com)



# Partner<sup>XE</sup> by SIS

## Grow Your Business

**Retain customers, upgrade policies, cross sell, and expand your client base.**

Partner XE's many features allow you to:

- Free up more time for one-on-one interactions with customers.
- Run queries to define cross-selling opportunities.
- Target individuals within your system who fit a certain profile.
- Create, execute and track systematic targeted marketing plans.
- Run lists, print letters, print envelopes, export email addresses directly from the system.
- Track conversations with clients and prospects.
- Manage all contact information with a few clicks of the mouse.

## What Our Clients Say:

*With Partner XE, we are able to provide much more service to our customers, much faster and at a much-reduced cost. While automation costs money, the reality is that an agency management system like Partner XE saves us money.*

-Mike Miller, Sheward Insurance Agency, Inc

*"Independent insurance agencies are sales and service organizations. When a system takes care of those little tasks it gives us the time we need to interact with current and potential clients. The key is having the right agency management system that lets us interact better with clients – like Partner XE does."*

- Kevin O'Brien, O'Brien Insurance

## Manage Workflow

**Eliminate workflow redundancies and increase productivity.**

When every day is a race to get things done, efficiencies mean a lot. To be effective, you **NEED** to have the information you need directly in front of you and readily accessible with a few clicks of the mouse. A system that is tied to your desktop just won't cut it. You need an agency management system that can be accessed anytime, by any number of users. Partner XE provides streamlined workflow, through:

- Real-Time connections with carriers.
- Quick, easy, secure access to client and policy information.
- Secure, permanent records of customer transactions.
- Secure on-line hosting.
- Paperless, DocBox document storage system.

## Enhance Customer Service

**Empower your agents and CSR's with technology that works as hard as they do.**

Partner XE's Search Navigation, Contact and Client and Policy Management features put the information you and your reps need at your fingertips, enabling you to respond to your customers quickly and efficiently.

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# Partner <sup>XE</sup>

by SIS



## Connect with carriers

***Make manual data input into a carrier system ancient history.***

With Partner XE, you can access your carriers in Real Time – making it easy to stay current with information about your policies and clients without having to log into multiple systems. Not only that, you can also securely pass client information to the carrier web site to pre-fill information, saving hours of redundant entering.

## Go Paperless

***Digitize your filing and reduce E&O risk with Partner XE's document storage system.***

The Partner XE agency management system uses an internal transactional filing system (designed to be compliant with existing E&O standards) to manage storage and store all system files and activities.

The storage and retrieval of documents is quicker, easier, and more secure than ever with Partner XE's Document Storage System (DocBox).

## Increase Data Security

***Protect your critical agency files and eliminate IT concerns.***

SIS ensures data confidentiality, integrity and availability. Your data and your business are our number one priority.

When you choose Partner XE, SIS' fully hosted insurance agency management system, not only do you enjoy lower more predictable costs, you also get peace of mind knowing your data is safe; less time worrying about technology, and more time to focus on what you do best .

## What Our Clients Say:

*"Our management system makes us so efficient that we're able to spend more time in one-on-one interaction with the customer... it helps us more effectively track all of our prospecting, manage our lists and record how and how often we're marketing to each individual."*

- Jeff Sargeant

## Streamline Accounting

***Say good-bye to multi-system redundancies with Partner XE Accounting.***

Accounting should be easy. With Partner XE's fully integrated module, it is. When you choose Partner XE Accounting over a generic "boxed" version, your accounting system and your agency management system WORK TOGETHER, eliminating redundant inputting. Streamlined features keep daily busy-work to a minimum.

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“SIS and Partner XE provide all the capabilities needed to run either a small agency, or agencies with over 100 users - at 50-60% of the cost of the major system providers”

## Why Choose Partner XE?

To stay competitive and grow as an independent insurance agent, you need to maintain your current client base, cross-sell more policies, and pick up new business. You need to be able to distinguish yourselves from the competition with outstanding customer service. You need to stay in constant communication with the carriers, clients and prospects. You need an agency management system that stands out from the rest, streamlines the process and works FOR you. You need Partner XE from SIS.

Are You Fed Up With...	Sis Can Help
Poor service ?	At SIS you will know our team by name, and we will know yours. We will work together to resolve any issues that you have as quickly as possible, and pledge to work hard for your business.
Continual price increases ?	SIS will lock in your Partner XE pricing for up to 3 years.
Paying for specific downloads ?	With SIS/ Partner XE all downloads and Real-Time functionality are included.
Paying yearly data storage fees ?	With SIS/ Partner XE, unlimited data storage is included.
The need for extensive training on your current system?	“Best in the business” Outlook integration makes Partner XE, intuitive, easy to navigate and easy to learn

Partner XE also provides excellent visibility into your business operations; makes access to your data quick and easy; provides Real-Time and download capabilities; reduces IT and server costs, and much more!

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