

# Powered by Agile

## Old traditions. New tech.

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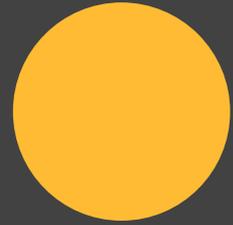
How our online platform helps brokers and partners put new business and renewals on autopilot.

BEN WEBSTER & ROBIN BARHAM - OCTOBER 21

# Agenda

## What we'll cover

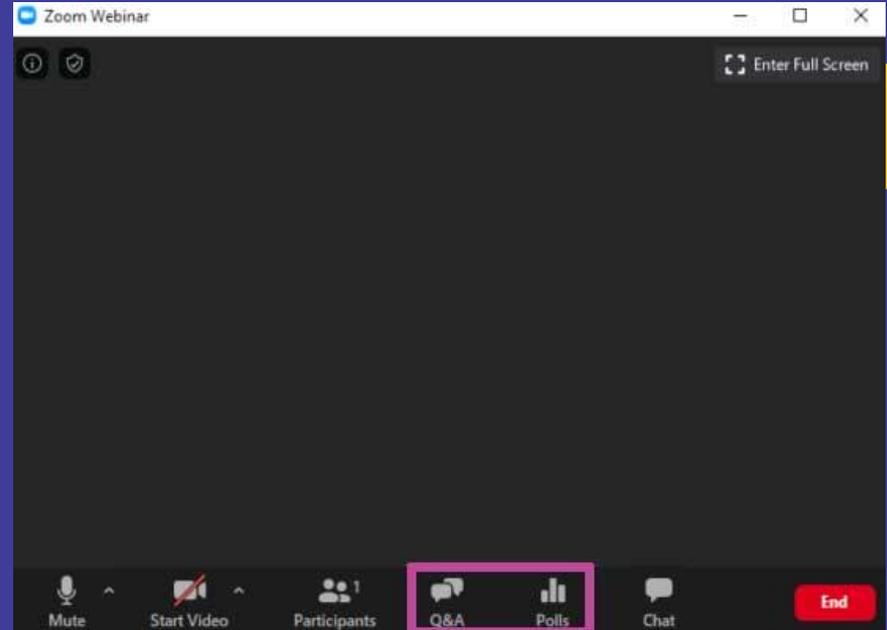
- Welcome
- About Agile
- Our Security
- Powered by Agile
- Questions



# How to ask a question

## Some of the interactive features

- Kicking off poll - should be on your screens
- Questions and answers
- The team will answer as many as possible
- We'll tackle the curly questions at the end



# CPD points

## How to access the CPD registration code

They'll be in the second last slide and we'll also send you these via the email you used to register.

# About Agile

## A next generation MGA and Lloyd's Coverholder

- Formed in 2015, AGILE is a next generation insurance agency and Coverholder at Lloyd's that blends old traditions with new technology.
- We're independently owned by the original founders- not owned by any of your competitors.
- Local staff in QLD, NSW & VIC with over 400 years of underwriting experience
- Deep insurtech and technology expertise
- Launched over 21 products on our PBA Platform

# Security

## Where we source our capacity

- +98% of our Underwriting is on Full Authority Binders
- **Binders**
  - General Aviation, A+H, Cargo, Casualty, Construction, Contingency, Cyber, Drones, Financial Lines, Retail Travel
- **Security**
  - 11 Lloyd's Binders
  - 2 APRA Company Binders
  - and 2 Lloyd's Facilities for hard to place Property
- **3 new Binders in the last 6 months.**

# Some info about Ben

## Co-founder of AGILE

- Background in customer experience and interaction design
- Started in 'insurtech' in 2004 when we was part of the World Nomads team
- Specialises in niche insurance products
- Has deployed diverse platforms from Pet to Bond Surety, Aviation and Marine
- Launched over 50 insurtech products
- Sold over 3 million policies on digital platforms

# At Agile we brokers

When brokers succeed... we succeed.

# Brokers are under increasing pressure

From a wide range of fronts... including

- Automation
- The rapid rate of change in regulations
- Growing administration and reporting requirements
- Expanding direct to market platforms
- Increasing customer expectations
- ... *and decreasing commissions and fees*

# Brokers are being asked to do more ... with less

And that's where we come in



# We want brokers to do less with more

While retaining the same commission

## We want brokers doing more of what they're good at

- Understanding the customers' needs
- Ensuring customers are not under or over insured
- Saving the customer time and money
- Advocating at claim time

## And doing less busy work

- Processing proposal forms
- Filling out spreadsheets
- Chasing debtors
- Asking for claims updates
- Shopping for capacity

# Available products

There are 21 products on the platform with more coming

## Accident & Health

Bill Cover  
Individual Accident & Sickness

## Cyber

CyberCare

## Cargo

Inland Transit

## Aviation

ACRE  
LAME  
Pilot Cover  
Glider  
L2 Cover  
Light Aircraft Cover  
Vans Aircraft Cover

## Casualty

Allied Health Liability  
Short Stay Accommodation  
Couriers Liability  
Transport Liability

## Financial Lines

Audit Cover  
Real Estate PI  
Consultants PI  
IT Contractors PI

## Coming soon

Drones  
Legal Fees  
Wedding  
Remote Workers  
Parcel

# Four ways to bind

Flexibility to match how you work with your customers

## You quote & bind - your system

*Highest touch*

You can create a quote & bind using our platform by generating documents and sending them to customers using your own systems.

## You quote & bind on PBA

*High touch*

You can create a quote & bind using our platform and our system will send emails and manage approvals.

## You quote - they bind

*Low touch*

You can create a quote using the platform and then email the quote to the customer and they can bind with their credit card.

## Referral

*Zero touch*

Use your partner ID to refer customers to your site where they complete the purchase. This can be via a website, an email newsletter, or even SMS.

Traditional

Automated

You receive the same commission regardless of the method used to bind

# Renewals on autopilot

And you receive the same commission

## Managed renewals

*30 days out from renewal*

We generate a quote on last years parameters and email the brokerage that the renewal is ready to manage. From there you can login and manage the renewal manually.

## Automated renewals

*30 days out from renewal*

We generate a quote on last years parameters and email the policyholder. The customer can review and adjust the renewal and either bind or send an approval to you.

Traditional

Automated

You receive the same commission regardless of the method used to renew

# It's your data

## How we share and manage data on Powered by Agile

- You own the customer
- Data is available on your dashboard 24/7
- You can download your data at any time (I'll show you how in a few minutes)
- Data is backed up in real time

# Core features of the platform

## How Powered by Agile can save time and drive more commission

### **Embedded links**

Referral links that can be placed on your website, email newsletters, email signatures and text messages that track quotes and sales back to your business.

### **Track quotes in real time**

Quotes can be tracked in real time and you can resend quotes to clients at any time.

### **Four ways to quote & bind**

We've built features to match the flexible ways you like to interact with your clients

### **Automated renewals**

The platform can automate renewals and commissions of every policy bound.

### **Track policies in real time**

Policies can also be tracked in real-time.

### **Emails and documents**

The platform generates and tracks all emails and documents needed to quote, bind and renew.

### **Data and reporting**

Your data is available 24/7 to be downloaded.

# Schemes

Ever passed up a distribution opportunity because...

- It was too costly to process?
- The capacity wasn't interested because the scheme was too small?
- It was too hard to reach the customer?
- There was no existing product in market that was fit-the-purpose?
- The regulatory exposure was too high?

That's where the platform comes in



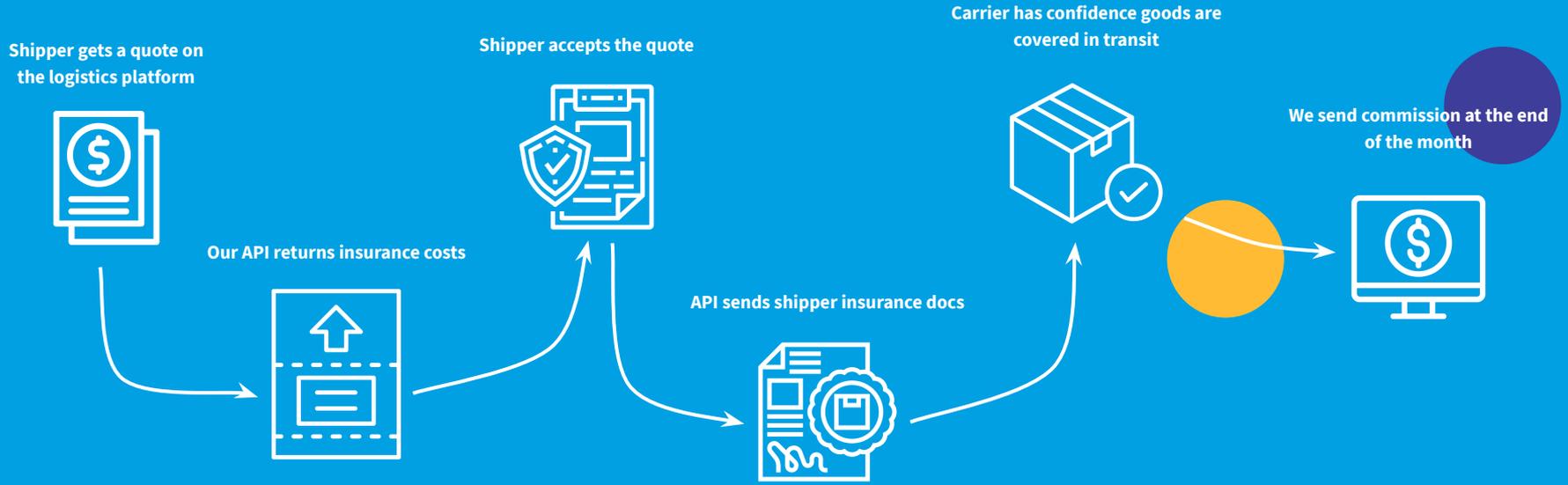
# Ten schemes live on PBA

If you have a scheme... we'd love to chat if...

- It's been hard to find capacity
- Admin costs made the scheme not profitable
- The scheme can be used to quote and bind online
- The scheme could benefit from an API to integrate two online systems

# How the API works

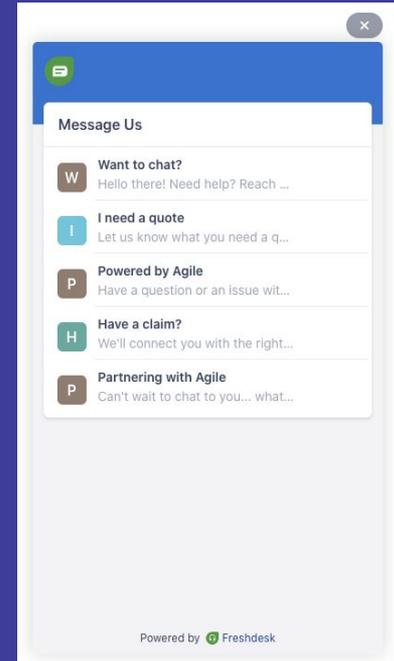
Using inland transit and embedding into logistics platforms as an example



# Getting help & how to videos

We're always available to help you quote and bind

1. Contact us via chat while on the platform
2. Email [hello@agileunderwriting.com](mailto:hello@agileunderwriting.com)
3. Log a ticket via our help centre <https://help.poweredbyagile.com.au>
4. The scheme could benefit from an API to integrate two online systems
5. View our [How to Videos on the help centre](#)



# What they're saying

## The industry is responding positively to the platform

“Everything at Agile is underpinned by technology and that enables them to be nimble and, well, agile. Agile has good people and a great reputation and pedigree.”

**Michael Giansiracusa**  
CEO, Whitbread Insurance Brokers

“We're incredibly selective about who we deal with and Agile has passed the test for exceeding our expectations.”

**Daniel Webber**  
Director, Webber Insurance

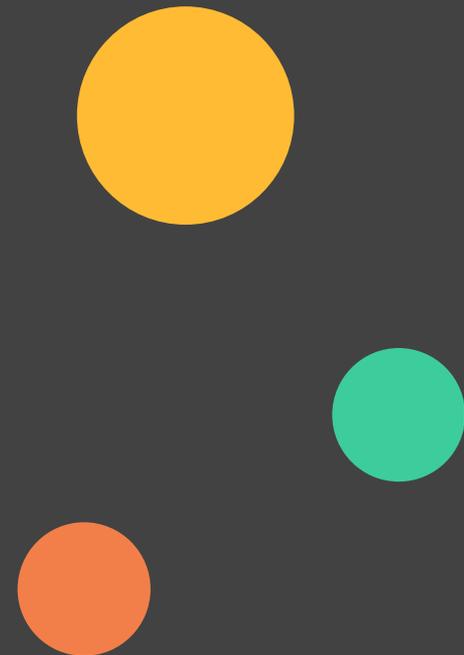
“Agile understands that we want digital, quick, efficient, cost-effective solutions for clients. They're differentiated by providing excellent service, that's their product.”

**Drew Fenton**  
Director, Fenton Green & Co

# Polls

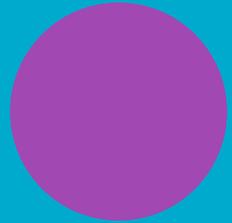
Why are you attending... let's review the results.

New poll: what products would you like to see on the platform?



# Demonstration

Let's run through the platform together



# Polls

What products would you like to see on the platform?... review the results.

New poll: What features would encourage you to use Powered by Agile more?

# Important links

## How to get started on Powered by Agile

### Brokers

If you want to get started on the platform get in touch with the team and we'll send you a TOBA.

#### Trang Ha

[trang@agileunderwriting.com](mailto:trang@agileunderwriting.com)

#### Agile Support

[hello@agileunderwriting.com](mailto:hello@agileunderwriting.com)

### Partners

If you want to get started on the platform get in touch with the team and we'll send you an agreement outlining the structure.

#### Agile Support

[hello@agileunderwriting.com](mailto:hello@agileunderwriting.com)

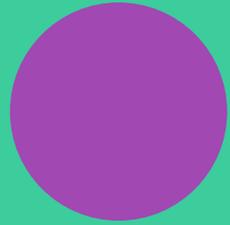
### Developers

If you want to use our API to embed insurance in your own website or platform you can start with our API documentation.

[View the API docs >](#)

# Questions

A few questions from the attendees



# Polls

What features would encourage you to use Powered by Agile more?  
... review the results.

New poll: How likely are you to use Powered by Agile?

# CPD points

The National CPD Register Code is 18641

Following the session there'll be a short feedback survey and we'll also send you the code via the email you used to register.

# What else do you want to know?

How to contact us to discuss in more detail

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