SIG

Grow. Retain. Enjoy Your Business.

Choose the proven management system that will meet the needs of your entire brokerage - from leadership and producers to accounting and customer service brokers.

Manage your client relationships

Keeping all contact details, marketing information and activities at your fingertips, allowing your Account Managers, Producers & CSR's to focus on what is important – Customer Service!

- Work on multiple clients simultaneously with extensive search capabilities, saving time and reducing frustrations.
- Suspense tracking aids in organizing your tasks by client, priority or task type.
- SEMCI upload in XML format eliminates re-keying information from SIG into Insurer portals.
- eDocs are transmitted directly to SIG automatically attaching to the client file for Commercial and Personal lines.
- SIG's Launch manages user names and passwords to external websites.
- Certified by Grant Thornton Accounting firm and GAAP compliant, our accounting functions are built into the system versus an add-on module.

Tools to help manage, grow and retain your business!

- Keal Engage allows you to automatically send surveys based on different workflows to clients and will automatically record their client engagement in SIG.
- Define your target list through an expansive range of criteria. Easily set up a cross sell campaign, export underwriting information to Excel for analysis or import prospect lists electronically.
- Identify at a glance what value a particular client brings to your office. Are they part of the 20% of your book that drives 80% of your profit? Are they part of a group? Do they routinely have payment issues or need special handling? You can even assign special class names to limitless groups!
- Extensive Reporting abilities. Integration with Microsoft Excel allows you to export reports to apply Pivot Tables and Macros.

Looking for your own customization and brand?

- Flexibility and customization of the program with SQL tools for individually added functionality and client requests is possible because of our SQL platform
- Brand your letters with the word merge utility, creating easy to use Form letters
- Add and customize coverage's, add logos and define coverage packages by company, lines of business and form type.

Additional benefits

Enhanced E&O Protection – a secured audit trail that allows you to view all changes made to the file since inception, bringing you enhanced security and file integrity.

Paperless Solutions – Our companion product DOK is an integrated scanning and image document management system that stores scanned or electronically attached documents in a secured activity list within the client file.

Document Management – Integration with Adobe Writer allows you to easily save or email reports, applications, loss notices or general forms in a PDF format.

Customizable Security – Define the length and expiry dates for passwords. Group your users into authorization groups that determine their level of access to clients, data entry screens and reporting information by Division/Department.

Service, Service, Service – Did we mention service? Our Support team is proud of their adherence to a dedicated service level agreement. The majority of our staff have been with us for anywhere between 10 to 40 years. This long term tenure ensures you the expert advice you deserve.

Testimonial

"With the advent of SIG, gone are the days of paper files, T-filing and snail mail! SIG allows us to generate and print customizable reports in real time, accommodate branch office setup, and reassign accounts and policies to a new rep within minutes. The Keal team is approachable and has a listening ear when it comes to our recommendations on product improvements. Our team simply loves it! New employees often commenting positively on SIG's features compared to their previous Broker Management System."

Louise King, CAIB, VP & COO
MacLeod Lorway Financial Group

Integrated options to know about

- EDI download – added bonus; reject the renewal and automatically go to exception list for review before automatic-billing.
- Client Portal
- Keal Rating, Compu Quote and PowerQuote
- Keal eSign - securely send applications and documents for signature and store in the client file for easy access.
- Microsoft Outlook - drag and drop incoming mail directly into the client file, and send emails directly from your client file.

Implementation Process

We know you need as little disruption to your business as possible. Keal's experienced professional services team takes brokerages live every month. You work with a dedicated project manager using proven processes to ensure a successful transition. Training on core processes, as well as self-paced training, will give your staff the support needed to build skills and expertise to ensure a successful implementation.

Ready to get started?

We offer personalized complimentary demos daily, email us at **sales@keal.com** and see the benefits you stand to gain from the many Keal Solutions.

Workstation Recommendations

For the best user experience, we recommend using SIG with Windows 8.1 /Server 2012 R2 with Internet Explorer 11.

KEAL

For more information on this product contact us at 800.268.5325 | keal.com

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