

**TOP 5**  
**NEW YEAR'S  
RESOLUTIONS**

**FOR INDEPENDENT  
AGENTS AND BROKERS**



**COLLEEN WELLS  
CHIEF STRATEGY OFFICER  
AT VERUNA**

As we usher in a new year, it's time to set the stage for success in the ever-evolving landscape of insurance.

Embrace the transformative power of technology and innovation with these **Top 5 New Year's Resolutions** tailored for independent agents and brokers.

Let's make 2024 a year of growth, efficiency, and digital mastery!

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# Automate for Efficiency

**Streamline your operations and focus on client needs with the power of automation.**

In 2023 we saw a *significant* increase in identifying ways to add automation, simplifying processes for Agents to create efficiencies and focus on their customer needs.

We expect the trend to continue into the new year as agencies fight to stay competitive.

# Time for Digital Mastery

**Stay in the know and elevate your client experience.**

Back-office systems have trended tech-savvy for several years.

Client-facing digital tools are only recently seeing adoption among independent agencies.

With the ease of creating self-service portals, we expect them to become table stakes for client satisfaction in the coming year.

# Drive Growth by Embracing Tech

**Optimize processes to automate your growth engine.**

Agencies who use technology across brand awareness, campaign generation and streamlined sales have seen growth for years.

Now, most independent agencies have the same high-horsepower tech the big shops have used for years. We expect the results to be quite obvious next year.

# Join the Low Code Movement

**Take control business without being a computer genius.**

How you work is in your hands, with the ability to easily create workflows, change data elements, and support niche Lines of Business.

You can get there faster than ever thanks to new technology on the rise. Companies who embrace low-code options will see the best results next year, and they won't break the bank.

**Now, the most  
talked about  
trend for 2024  
and beyond.**

**(And why it needs to be on  
your list of resolutions)**



# Integrate AI

**Unlock the potential of Artificial Intelligence in 2024.**

Believe it or not, few agencies have yet to take advantage of what AI can offer them.

Be on the lookout in 2024 for agencies to get more alignment and find simple use cases that change how they work.

**Spoiler alert:** Veruna is helping agents blaze the path!



**Ready for your  
best year yet?**

**2024**

**These resolutions will set you  
on the path to success!**

**Need a little guidance?  
Visit us at  
[veruna.com](http://veruna.com)**

# ABOUT THE AUTHOR

Colleen is the Chief Strategy officer at Veruna. With over 20 years of experience in the insurance industry, Colleen knows first-hand the hassles that technology has yet to solve. In her role at Veruna, Colleen guides the product and overall company strategy, pushing relentlessly to put the power of technology in the hands of independent insurance agents and brokers.

Veruna empowers insurance agencies and brokers to sell more and maintain customer relationships better. Veruna does that by leveraging the world's #1 customer relationship management platform – Salesforce.com – to help agencies and brokers find opportunities, win business, and engage with customers more regularly and relevantly.

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