

JOURNEY



WELCOME

A NEWSLETTER?

WHAT'S NEW

**LEARN ABOUT AGENCY
UPDATES AND CHANGES**

MEET THE TEAM

**LEARN MORE ABOUT
OUR TEAM AT VANTAGE
POINT RISK**

WELCOME

As we start 2024 and the recent ice storm affected so many people and businesses, I was reminded of our strong community in the Pacific Northwest.

As a business owner and resident of the PNW, one of my goals is to support other businesses and enjoy exploring all the PNW offers.

This newsletter is new for my agency, and I am excited to see how it evolves. My goals with it are to share with you, our valuable customer, what is going on both from a business aspect and the personal side with our team.



*Richard And Olive in Eastern Oregon
Olive is a Wirehaired Pointing Griffon*

I hope you find the information educational, informative and that we have a little fun together on this journey.

If you have feedback, want to see different features, or have a comment, I'd love to hear it.

As with everything in business, there is a cost to producing and publishing this newsletter, so we will alternate between hard copy and E-Copy. When the E-Copy comes out, we will ask people if they want to continue to receive our agency newsletter.

We understand that not everyone wants it and want to respect that. If you just recycle it without reading it, I'd rather save the money.

Thank you for reading, and I hope you enjoy this first copy and continue on this Journey with us at Vantage Point Risk.

Richard Sweet

Richard Sweet
Owner

WHAT'S NEW

As we have continued to grow, we have outgrown the original software platforms I set up for the agency. In the world of insurance, you typically have two software platforms;

1. **Agency Management Systems (AMS):** This is our organizational wizard, managing all the policy and client details behind the scenes.
2. **Customer Relationship Management Systems (CRM):** This is our tool for keeping in touch with you and our clients, ensuring every interaction is meaningful and personalized.

What does this mean for you?

When an insurance agency combines an Agency Management System (AMS) with a Customer Experience Management (CEM) system, it creates a powerful duo that significantly enhances the customer experience.

I'm really excited to share that we're partnering with Hawksoft and Agency Revolution, both Oregon based companies! This move is about enhancing our promise to you – delivering outstanding, tailored services.



Hawksoft, a comprehensive Agency Management System (AMS), offers a range of features designed to streamline our agency's operations. With its robust data management capabilities, we can efficiently handle client information and policy details and streamline our workflows. This integration means more accurate, quick, and personalized service for you, our valued clients.

Complementing **Hawksoft**, we've partnered with **Agency Revolution**, a leading platform in customer experience management. This system empowers us to engage with our clients effectively through personalized communication. With Agency Revolution, we can leverage data from our AMS to create more relevant, timely, and tailored interactions, enhancing your experience with our agency.

MEET THE TEAM



Richard Sweet
Owner/Founder of Vantage Point Risk

What five things are truly important in your life?

- My Wife Rebecca
- My Son Cayden
- My dogs Olive and Niko
- My Family and Friends
- My Business

Callan Vaccaro
Personal & Commercial Advisor



What five things are truly important in your life?

- My Family
- My Faith
- Humor
- My Integrity
- Humility

Allan Sefton
Health Insurance & Medicare Guru



What five things are truly important in your life?

- My Family
- My Friends
- My Business
- Relationships
- My Golf Game

Learn more about each of us on our website

