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PRACTICAL GUIDE FOR BROKERS

The insurance software shortlist *you've been looking for*

We did the research so you don't have to: a handpicked list of insurance software for brokers and agencies, by category, with what each one does, pricing and where it operates.

A Foliume guide | 2025 edition | 14 tools

At Foliume we put this list together so you can keep a clear, organised view of the software brokers and agencies use around the world. It comes in three blocks: CRMs, agency management systems and specialised platforms.

01 CRM

CRMs *built for insurance*

SOFTWARE	WHAT IT DOES	PRICE	WHERE
Assur3d	All-in-one CRM for brokers: client data, contracts, policy management, claims tracking and communication in one place. Built for small and mid-sized agencies.	From €39.90 per user per month	France
OGGO	CRM with multi-quote capabilities, pipeline tools, email campaigns, insurer connections, document management, click-to-call and web integrations.	From €69 per month	Primarily Europe
LYA	Case and document management with automated legal documents, reminders, data organisation tools and product comparison.	From €29 per user per month	France and other European countries
Freshsales	CRM for small agencies with AI lead scoring, email tracking, workflow automation and an intuitive interface.	From $9 per user per month	Global
Zoho CRM	Email, phone, chat and social in one place, with pipelines, automation and a built-in AI assistant. A generalist CRM many agencies adapt to insurance.	From $14 per user per month	Global

If you want a deeper CRM comparison, with six options and a selection checklist, see the insurance CRM guide in the Resource center.

02 AMS

Agency management *systems*

SOFTWARE	WHAT IT DOES	PRICE	WHERE
Vertafore	Solutions such as AMS360 and QQCatalyst, focused on agency management, compliance and client servicing.	Not specified	United States, Canada and India
AgencyBloc	Specialises in health and life insurance agency management: CRM, commission tracking and workflow automation.	From $59 per month	United States

03 SPECIALISED

Specialised *platforms*

SOFTWARE	WHAT IT DOES	PRICE	WHERE
Foliume	AI platform that automates the repetitive work of insurance distribution. Wilbert, the AI agent, quotes, renews, opens claims and deals directly with insurers, and the team approves from the same board. It connects with the agency's current tools.	Contact us	Spain and Uruguay
GloveBox	Lets policyholders access documents, pay bills, file claims and manage policies from an app or portal fully integrated with their agency.	From $499 per month for small agencies	United States
Insly	Modules for policy management, accounting and claims, with a focus on automation.	From €3,000	Europe, UK and expanding globally
Acturis	Cloud platform for brokers and insurers covering policy administration, underwriting and claims management.	Not specified	UK and Europe
Guidewire	Comprehensive solutions for property and casualty insurers: policy administration, billing and claims.	Varies by implementation	North America, Europe and Asia

SOFTWARE	WHAT IT DOES	PRICE	WHERE
Sapiens	AI and advanced automation for insurers' core solutions: reinsurance, finance and compliance, data and analytics, digital and decision management.	Not specified	More than 30 countries
Cubox	Tools for policy management, client relations and operational efficiency.	From $60 per month	Latin America

How to use this shortlist

- Start from what slows you down today: management, sales or repetitive tasks?
- Ask two or three options from the same block for a demo and compare them on the same cases.
- Make sure anything new talks to what you already have. Fewer tools, better connected.

CONCLUSION

Fewer tools, *better connected*

The problem for most agencies is not a lack of software but having it disconnected: data in one place, conversations in another and the team copying between the two.

Choose little, choose well and make sure the new talks to what you already have.

To eliminate manual work in your daily operations, discover how Foliume connects with your current tools.

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The guide tells you what to do. *Foliume* does it with you.

Your team and AI agents on the same board to quote, serve clients and deal directly with insurers. You approve, Wilbert executes.

Meet Wilbert →

More resources