# ZYWAVE

2026 WINTER LAUNCH

Welcome to the Future of Connected Insurance Workflows.

With the Zywave Winter 2026 Launch we're building a future where insurance workflows are smarter, faster, and fully connected. From quoting and proposals to analytics and carrier management, our platform simplifies complexity and empowers your team to deliver more value with less effort.

This release represents a significant leap forward in how insurance agencies operate, integrating powerful capabilities across our entire platform to help you grow organically, distribute more effectively, and elevate every client and team member experience.
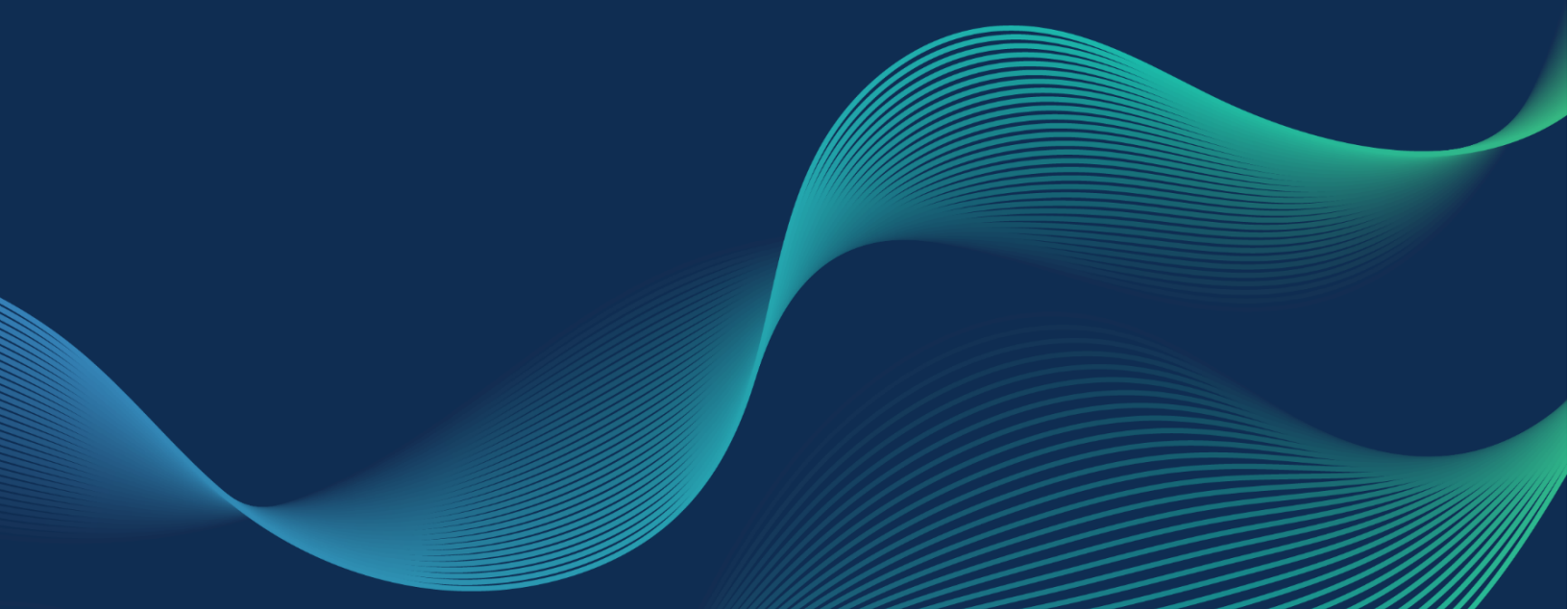
Agentic AI: The Future of Software-as-a-Service

A growing ecosystem of AI agents that execute real workflows across marketing, data, content, and core insurance systems - starting with producer growth.

AI PRODUCER AGENTS

Agency | Personal Lines, Employee Benefits, Commercial Lines

Zywave's AI producer agents make lead generation more efficient and less painful. This agentic workflow taps into Zywave's industry-leading data and content solutions to identify ideal prospects and initiate targeted outreach at scale. The workflow helps insurance providers reach the right prospect with the right message at the right time. And it allows producers to focus on seizing opportunities and building relationships. This ecosystem of AI agents helps with:
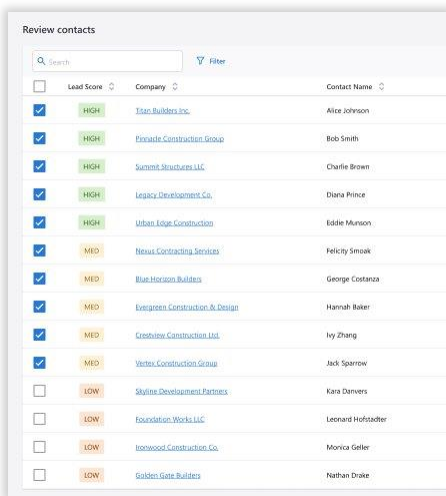
PROSPECT SEGMENT IDENTIFICATION

Analyzes your existing book of business to unearth actionable patterns of data about the clients you work with today and then transforms these data insights into Ideal Customer Profiles (ICPs) that can be leveraged to identify new prospects that share common traits with your existing clients.

ZYWAVE
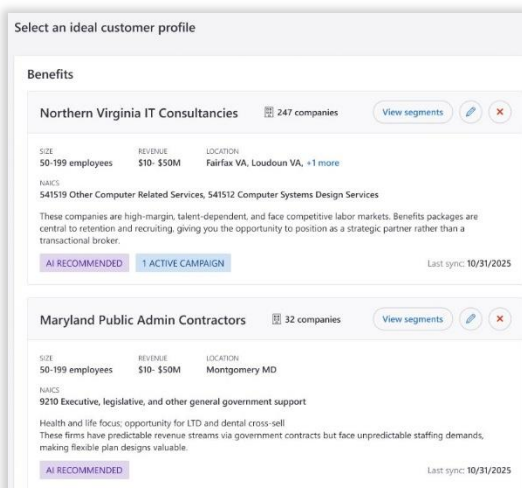
LEAD SOURCING & SCORING

Feeds your Ideal Customer Profile (ICP) into the MiEdge database to identify potential prospects and scores all the prospects that match your Ideal Customer Profile (ICP) based on statistical indicators of buying intent.

RESEARCH & ENRICHMENT

Generates a downloadable research brief about each prospect, highlighting critical information and insights, including actionable recommendations about specific topics to focus on when you meet with that prospect.

ZYWAVE

OUTREACH & OPTIMIZATION

Creates a unique custom email outreach sequence for each prospect. Each email subject, each email body, each content recommendation is a true 1 of 1, created just for that prospect by leveraging the rich data profile cultivated by the Research & Enrichment Agent.

Interested in learning more about our growing suite of Zywave AI agents? [Go here](Go%20here).

Service & Management

TURBORATER TWO-WAY INTEGRATION WITH PARTNER PLATFORM
Unified Quoting & Policy Management Workflow
Seamless two-way integration eliminates duplicate data entry by flowing Zywave TurboRater rates directly into Zywave Partner Platform for policy creation—and back again—connecting two powerful tools into one efficient process.

PARTNER PLATFORM: CLIENT LEDGER IN BROWSER EXPERIENCE

The Client Ledger now opens in a separate browser tab, maximizing screen space by removing left navigation and global search. This update makes it easier to view more ledger data, especially on smaller screens, and introduces expandable policy transactions along with in-browser access to the Beginning Balance and Transfer Credit dialogs for a more streamlined workflow.


ZYWAVE

AMS & Core Platform

ACCOUNT LABELS

Account Labels allow users to segment and organize their book of business using flexible, customizable criteria. This enables more targeted communication, improved reporting, and more effective client servicing across Zywave.

With this release, users can create, edit, filter, and delete labels to categorize accounts. Users can also export labels directly from the account list and manage labels through the Public Accounts API.

Account Labels provide a scalable and standardized alternative to free text fields for capturing key customer data. This results in cleaner segmentation and more actionable insights.
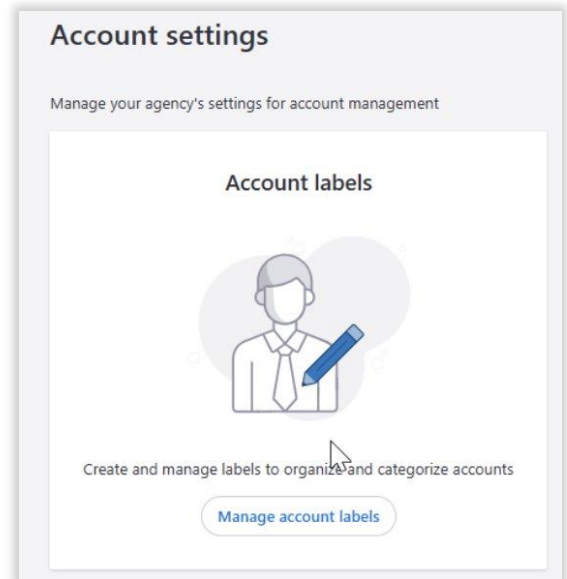
## CORE PLATFORM POLICIES: CARRIER & VENDOR MANAGEMENT

A new Carrier and Vendor Management experience is now available within Policy Settings. This enhancement allows users to manage the carriers and vendors available in Policy Management, ensuring cleaner configuration, more accurate data administration, and a more consistent policy workflow.

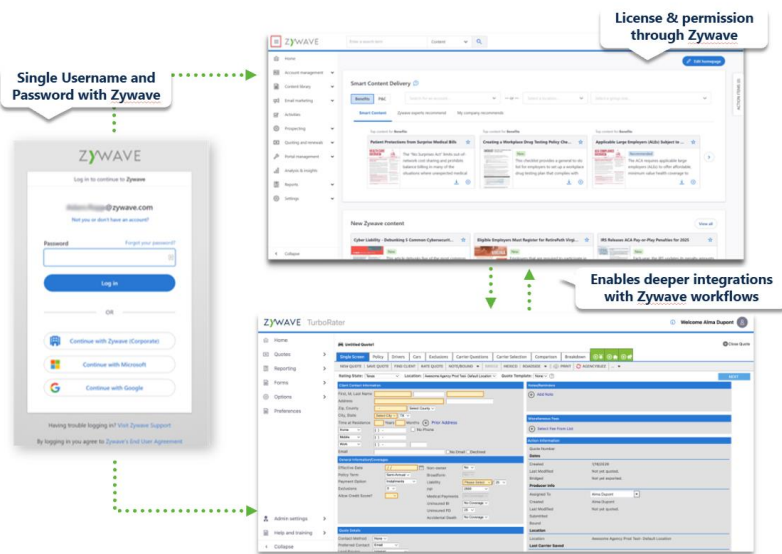
ZYWAVE

FULLY SELF CONFIGURE THE AMS360 INTEGRATION

Customers who use Zywave AMS360 as their agency management system can now configure their AMS360 integration entirely on their own. This includes accounts, contacts, and optional policies. The enhanced experience removes the need for Zywave involvement and gives customers the flexibility to set up the integration on their own schedule and at their convenience.

The AMS360 integration can now be fully configured directly within account settings. This includes authentication, field mapping controls, and data selection, all without contacting Zywave Support.
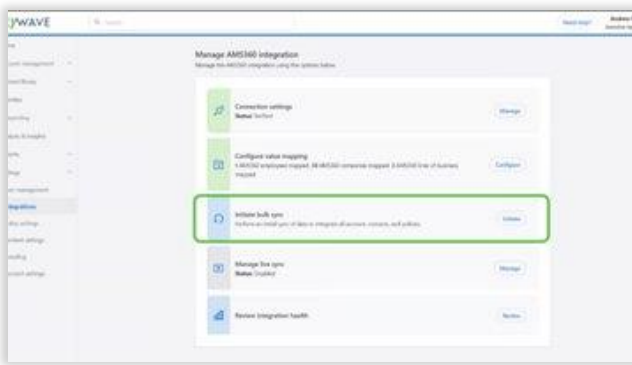
TURBORATER & ZYWAVE: ONE USERNAME & PASSWORD

Zywave TurboRater now supports unified authentication, making it easier than ever to access all your Zywave solutions with a single username and password. No more juggling multiple logins—just seamless access across the platform. This update also centralizes your license management and permissions in one place, giving you better control while setting the stage for deeper integrations and connected workflows that will streamline everything from quoting to client engagement. It's all about removing friction so your team can focus on what matters most: serving your clients.

Want to learn more about these new features and releases?

Watch the 2026 Winter Launch webinar or visit zywave.com.