

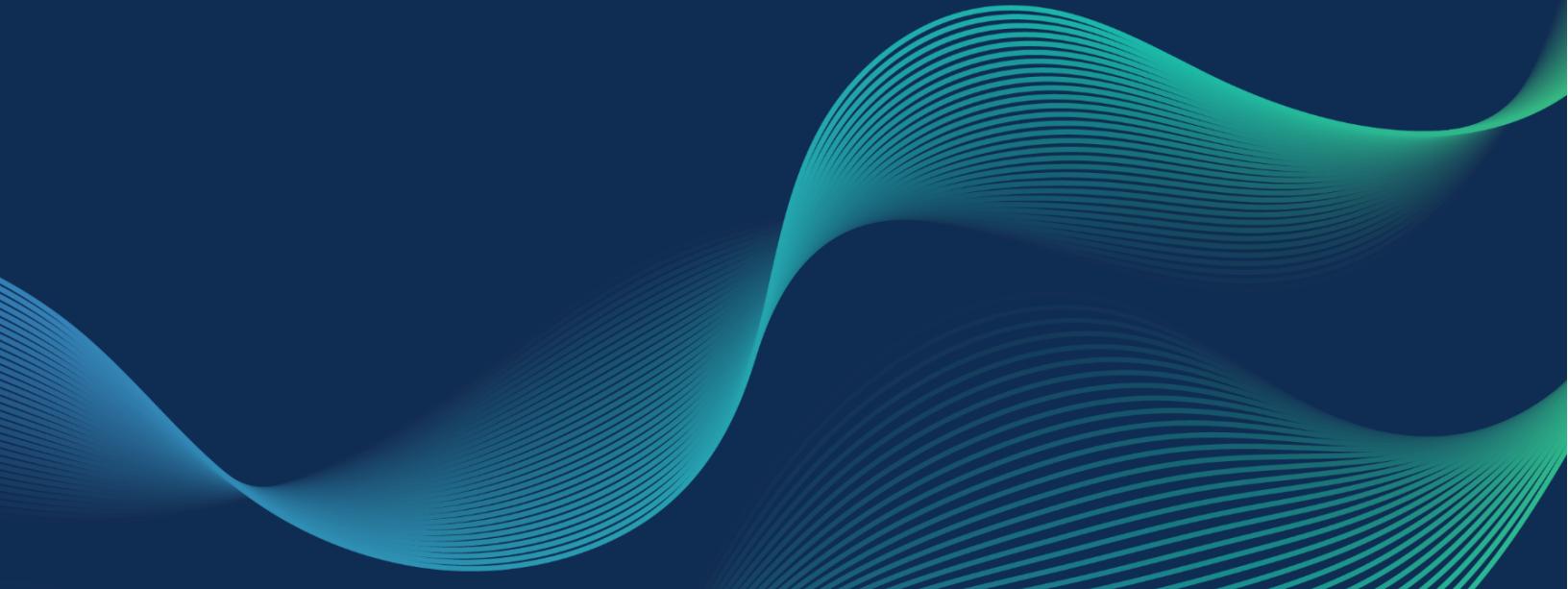


2026 WINTER LAUNCH

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.

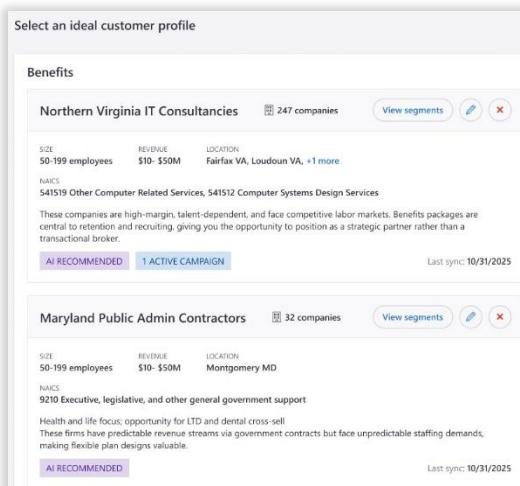
AI PRODUCER AGENTS

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.



The screenshot displays a software interface for selecting an ideal customer profile. It shows two segments:

- Northern Virginia IT Consultancies**: 247 companies. Details: SIZE 50-199 employees, REVENUE \$10- \$50M, LOCATION Fairfax VA, Loudoun VA, +1 more. NACRS: 541519 Other Computer-Related Services, 541512 Computer Systems Design Services. Description: These companies are high-margin, talent-dependent, and face competitive labor markets. Benefits packages are central to retention and recruiting, giving you the opportunity to position as a strategic partner rather than a transactional broker. Status: AI RECOMMENDED, 1 ACTIVE CAMPAIGN. Last sync: 10/31/2025.
- Maryland Public Admin Contractors**: 32 companies. Details: SIZE 50-199 employees, REVENUE \$10- \$50M, LOCATION Montgomery MD. NACRS: 9210 Executive, legislative, and other general government support. Description: Health and life focus: opportunity for LTD and dental cross-sell. These firms have predictable revenue streams via government contracts but face unpredictable staffing demands, making flexible plan designs valuable. Status: AI RECOMMENDED. Last sync: 10/31/2025.

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.

Review contacts			
	Lead Score	Company	Contact Name
<input checked="" type="checkbox"/>	HIGH	Titan Builders Inc.	Alice Johnson
<input checked="" type="checkbox"/>	HIGH	Pearlside Construction Group	Bob Smith
<input checked="" type="checkbox"/>	HIGH	Sunrise Structures LLC	Charlie Brown
<input checked="" type="checkbox"/>	HIGH	Legacy Development Co.	Diana Prince
<input checked="" type="checkbox"/>	HIGH	Urban Edge Construction	Eddie Munson
<input checked="" type="checkbox"/>	MID	Neuva Contracting Services	Felicity Smoak
<input checked="" type="checkbox"/>	MID	Blue Horizon Builders	George Costanza
<input checked="" type="checkbox"/>	MID	Evergreen Construction & Design	Hannah Baker
<input checked="" type="checkbox"/>	MID	Crescent Construction Ltd.	Ivy Zhang
<input checked="" type="checkbox"/>	MID	Vertex Construction Group	Jack Sparrow
<input type="checkbox"/>	LOW	Skyline Development Partners	Kara Danvers
<input type="checkbox"/>	LOW	Foundation Works LLC	Leonard Hofstadter
<input type="checkbox"/>	LOW	Ironwood Construction Co.	Monica Geller
<input type="checkbox"/>	LOW	Golden Gate Builders	Nathan Drake

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.

Commercial Lines Research Brief	
Fromm Family Foods	
<p>About Fromm Family Foods</p> <ul style="list-style-type: none"> • NAICS Description: Animal Food Mfg • Headquarters: Wisconsin • Founded: 1980 • Employees: 51-200 • Annual Revenue: \$10M - \$50M • Facility Size: Not available in source data <p>Current commercial policies & insures</p> <ul style="list-style-type: none"> • Commercial Auto: Not identified • Workers Compensation: 2009-2010 • Cargo / Motor Truck: Cargo Not identified <p>Workers compensation</p> <ul style="list-style-type: none"> • Carrier: ZURICH • Experience Mod: Not available in source data <p>Influencers & advisors</p> <ul style="list-style-type: none"> • Broker: AMERISKIN AND MCLENNAN ADVISORY • Broker City: MADISON • Broker State: WI • Accounting Firm: BAKER TILLY US • Benefits Broker: M3 INSURANCE SOLUTIONS 	
	<p>Compliance and Safety Record</p> <ul style="list-style-type: none"> • DOT 5 Year Accident: Not available in source data • DOT 5 Year Late: Not available in source data • Out-of-Service Rate: Not available in source data • OSHA 5 Year Violations: 0 (Last: 2017-07) • WHD 5 Year Violations: Not available in source data <p>Property Details and Hazards</p> <ul style="list-style-type: none"> • Property Data Available: No • Building Sq Ft: 0 • Land Sq Ft: 0 • Wildfire: Very Low • Flood (FEMA): Not available to Risk of Flooding • Fire Protection: Within Municipality & <= 1 Drive Miles from Fire Station • Crime: Average crime rate • Burglary: Low burglary rate • Tornado: High • Hail: High • Wind: High • Earthquake: No Damage • Lightning: Moderate
	<p>Sales Strategies</p> <p>1. Lead With Catastrophe Exposure (Flood, Wind, Hurricane)</p> <p>Why it matters:</p> <p>Their location sits in a 100-year FMA floodplain, is in a state-designated wind zone, and shows very high risk across flood, wind, hurricane, hail, lightning, and convolution sheets.</p> <ul style="list-style-type: none"> • Your property sits in one of the highest risk zones on the coast for flooding, and you are in a high wind zone. Have you reviewed your wind and flood insurance recently? <p>Talking Points:</p> <ul style="list-style-type: none"> • I specialize in Florida Catastrophe, and I can benchmark how your commercial property rates and deductibles compare to restaurants with similar hazard profiles. • We can look at Flood coverage through NFIP or private markets – and structure flood/hurricane deductibles more cost-effectively*. <p>Value:</p> <p>Shows deep knowledge of Florida CAT risk and emphasizes protecting revenue and shortening downtime after storms.</p>

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.

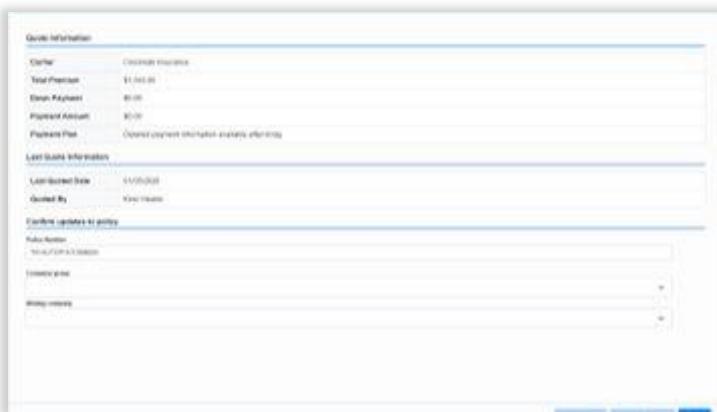
Interested in learning more about our growing suite of Zwave AI agents? [Go here.](#)

Service & Management

TURBORATER TWO-WAY INTEGRATION WITH PARTNER PLATFORM

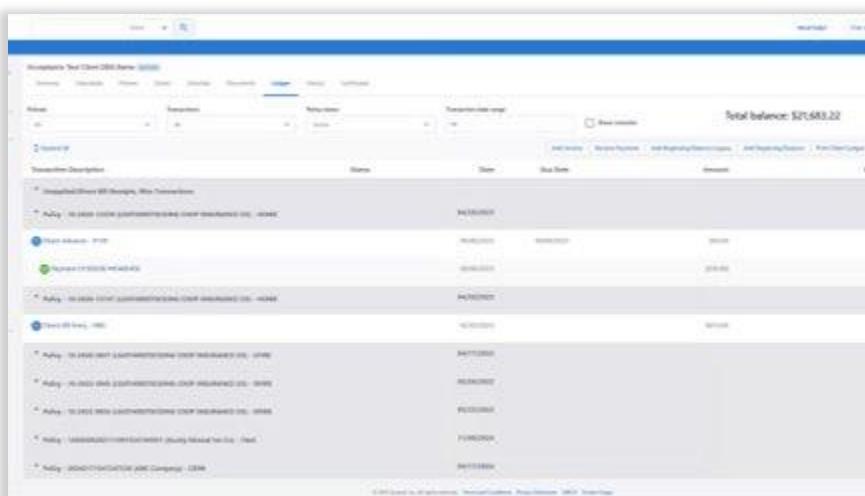
Unified Quoting & Policy Management Workflow

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.



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 Zwave.

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.

Account settings

Manage your agency's settings for account management

Account labels



Create and manage labels to organize and categorize accounts

[Manage account labels](#)

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.

Carrier Management

Managing carriers and vendors will make them available for selection when adding policies for your agency.

Carriers are also available for addition and activation in the carrier management section of the carrier management page.

Carrier	Count
1st Auto W/Car Ins Co	46725
1st Choice Advantage Ins Co, Inc	10258
21st Century Advantage Ins Co	26212
21st Century Auto Ins Co of Mi	10704
21st Century-CAR, Inc	8688
21st Century-Commercial Ins Co	34788
21st Century Ins Co	12963
21st Century-FL Auto Ins Co	10229
21st Century Health Ins Co	22795
21st Century-Private Ins Co	10218
21st Century-Retirement Ins Co	0

FULLY SELF CONFIGURE THE AMS360 INTEGRATION

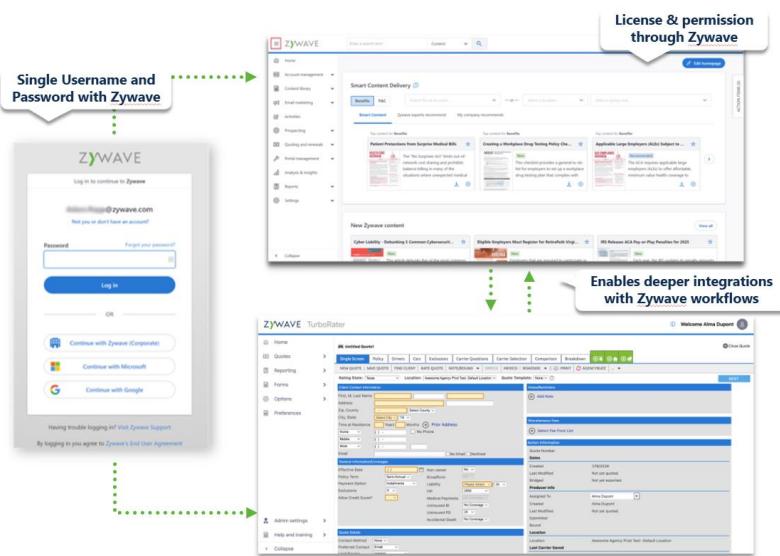
Customers who use Zwave AMS360 as their agency management system can now configure their AMS360 integration entirely on their own. This includes accounts, contacts, and optional policies. The enhanced experience removes the need for Zwave involvement and gives customers the flexibility to set up the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