

Customer Spotlight: US Premium Finance

Executive Summary

For over 25 years, US Premium Finance (USPF) has offered innovative, customer-centric, and smart solutions for insurance premium financing. Its partners include property and casualty insurance agencies of all sizes, from boutiques to the largest insurance companies in the United States.

THE PROBLEMS



Lack of customer service



Unsatisfied with results



Frustrating user experience

The Results

Scott Mitchell, Senior Vice President of Finance at USPF, was fed up with the payment provider the organization was originally using.

“We spent probably nine months just trying to set up a new account, and they couldn’t make that happen,” said Mitchell. “I can’t tell you how painful of a process that was.”

Mitchell’s focus was laser sharp as he began searching for a new payment processor. His #1 concern? Choosing a processor that could integrate with USPF’s management system, FinancePro.

Luckily for Mitchell, ePayPolicy does this seamlessly.

From an accounting perspective, Mitchell said other features that ePayPolicy provides have improved day-to-day operations.

“The transaction downloads has been a huge help,” he said. “We needed an easy way to link transactions that occurred in ePayPolicy to FinancePro.”

In order to do this, Mitchell simply downloads transactions each day from the ePayPolicy dashboard and reconciles them against what’s showing up in USPF’s management system. According to him, their previous payment processor had no easy way to accomplish this, even though they were integrated.

“ ePayPolicy is a slam dunk.
I would no doubt recommend you guys.”

Scott Mitchell, Senior Vice President of Finance at USPF

