

Reference List

Discover what our users highlight about our software to track Certificates of Insurance and ensure compliance with our cloud-based solution.

Certified Reviews



Commercial Solutions



“For the past 8+ years, we’ve used SmartCompliance to help us issue & track certificates of insurance, as well as manage the renewal process of over 60,000 certificates. Without the software this monumental task would be unachievable, regardless of how many personnel resources were available.”

Linda C. Thomas, Insurance Compliance Manager at CCMSI.



“We needed a dynamic COI tracking system that would help us drive new sales while giving us the ability to control the collection and compliance of critical data for our clients. We were fortunate to find SmartCompliance who have given us the tools, customer service & processes needed to meet & exceed our goals.”

Katy Lonneman, Compliance Administrator at Assured Partners.



“Certificates of Insurance (COI) are an essential part of managing liability in our organization. A manual process for COI Management can easily become a resource draining nightmare... By using SmartCompliance we’ve helped our clients increase their vendor compliance percentage by as much as 65%.”

Rachael Deely, Consultant/Strategy Marketing Manager at Commercial Insurance Consultants (CIC).



"SmartCompliance scans most of the information and adds it from the template speeding up the process so I don't have as much Data Entry to do."

Dawn Breault, Project Accountant at Wright-Pierce



"Were able to custom design the areas of analysis and evaluation in the reports section. This is critical to our operations and our Risk Transfer Program. The results aid us and our members in obtaining proper Risk Transfers and know that the limits and other specifications are 100% correct."

Brett Carruthers, Senior Vice President and Director of Innovation at Wright Risk Management.



"I liked the package that SmartCompliance provided for us. The combination of features, price, usability, and scale fit well with our goals. We were very focused on managing vendor COIs, so automated e-mails, compliance reporting, and pricing that was based on the vendor count, versus a document count. With multiple entities we didn't want to balloon our costs because of having several COIs per entity per vendor."

Ashley Oakes, Assistant Controller at Sugar Mountain.



"SmartCompliance has made our clients' life easier by providing a single location for all of their cert tracking and analysis."

Ryan Eddy, Director of Operations at AssuredPartners.

Property Management Solutions



“SmartCompliance works on its own! I Love the easy-to-use system and the fact it watches the dates and sends notices of non-compliance to clients. Everyday emails really get the clients to respond in an easy an automatic way. In the process, it saves us time and effort ensuring better results.”

Amy Newcomer, Executive Assistant from Risk Management LLC.



“SmartCompliance system is easy to learn and use. The full-service option was a huge bonus. We recently upgraded from self-service to full service and I am very happy with the customer service I am receiving.”

Heather Sheets, Compliance/Customer Relations Manager at Home Franchise Concepts.



“SmartCompliance has been a life saver for us! The ease to navigate through the system is simple and the different reports it will generate is outstanding. I use the software several times as day.”

Nicole Schmidt, Account Executive at Program Insurance Group.



“SmartCompliance is a great **Daily Vendor Management Program!** The system is great for day-to-day monitoring of hundreds of vendors. Also, the features allow vendors to upload their own documents and the ability to customize what each subsidiary is able to view and edit in the system.”

Sierra Cryderman, Risk Management Associate at Pacific Coast Companies Inc.

Solutions for Construction



“SmartCompliance is work Smart not Hard!!! This product was chosen by my boss to try to ease my load of my subcontractor’s compliance issues. Thanks to the software, I am able to keep all of my subcontractors in one program and keep up whether or not they are in compliance.”

Nicholean Randleman, Corporate Paralegal from SUEZ.



“SmartCompliance has given us peace of mind. What we like the most about the software is the user-friendly system that facilitates our daily tasks.”

Alexandra Aviles, Administrative Manager at Perrier Esquerré Contractors, LLC.



“SmartCompliance is able to procure provided certificates in a quick manner. Is also easy to use! I work remotely and haven't had any issue and figure out in days.”

Christopher Nance, Contract Associate at Thyssenkrupp Elevator.



“It's easy to give users access and streamline the process to collect and check on compliance comparing it to specific Requirement Groups.”

Kristin Martin, Risk Manager at Pacific Coast Companies Inc.

Brokers Solutions



“We love SmartCompliance! Especially the auto follow ups and the ability to customize the program.”

Esty Rutner, Director of Operations at GM Insurance.



“We were really excited to get rolling with SmartCompliance as the other compliance system we’ve been using in the past was really not helpful in trying to make the system work for our benefit. The software does the trick and has come a long way from where we started been really ease to integrate with clients.”

Miriam Teitelbaum, Insurance Broker at HMM Brokerage LLC.



“I like that the certificates can be centrally located and the ability to have real time accuracy on coverage. I can pull a report and enter the coverage listed into our company's system. It is a very simple format and user friendly.”

Megan Carpenter, Insurance & Credit Projects at H&E Equipment Services, Inc.



“The software was recommended by our insurance agent who is responsible for the daily review and processing of the insurance certificates. I like the setup for our projects, ease of adding new companies and the visual display of compliance status.”

Laila Wood, Insured at GCON, Inc.

Partnership Solutions

We're creating bonds and embracing partnership with tech-disruptors to provide top notch custom platforms that enable open and unparalleled options to run businesses.



"We are thrilled to have SmartCompliance join the Partner Connect Program! This integration will give MRI clients the flexibility to track and manage Commercial and Residential Insurance in a single and cloud-based platform."

Madalyn McIntyre, Manager at Strategic Partnerships at MRI Software.



"SmartCompliance Insurance Tracking & Compliance Management software complements our seamless renter's insurance product. Together, we're looking forward to eliminating the administrative burden associated with renter's insurance for property management companies while offering easily accessible renters' insurance that is immediately bound through Lemonade."

Jorge Espinel, Chief Business Development Officer at Lemonade



"The franchise business model requires the management of numerous Certificates of Insurance (COIs) and that all the Franchisees have Insurance Coverage. We have been working with SmartCompliance for several years and they have never disappointed us. With this centralized and cloud-based software, we are re-writing history for the Franchise Industry."

Doug Groves, Owner and CEO at EZ CERT Management

Our Software is 100% Risk-Free!



We offer a no-hassle 100% money back guarantee for 30-days.

Love it or leave it without any risk!

Contact us at **(888)-818-4651** or visit our website **smartcompliance.co** to schedule a free demo.