UNLOCKED CRM

FREE GUIDE FOR INSURANCE AGENTS

Why your insurance CRM only does half the job

Marketing tools on one side, insurance CRMs on the other. Here's what running both costs you, and what changes when it's one system.

INSIDE THIS GUIDE

1. The two halves, side by side
2. 5 signs you're running a split system
3. What one system changes

Marketing tools

GoHighLevel & the white labels

- AI calling
- Email & SMS
- Workflows
- Pipelines
- Calendars

Insurance CRMs

Built for the back office

- Policies
- Commissions
- Agent hierarchy
- Contracting
- Book of business



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Both, in one system

SELF-CHECK

5 signs you're running a split system

1

You copy leads from one tool into another

Every hand-off between your marketing tool and your insurance CRM is a chance to lose a lead or a detail.

2

Commissions live in a spreadsheet

When your CRM doesn't know about the policy, the commission ends up tracked somewhere else.

3

You can't tell which campaign wrote which policy

Marketing data and policy data sit in different systems, so they never meet.

4

Your follow-up stops after the sale

Your automations don't know a policy was written, so renewals and reviews fall to memory.

5

You log in to two systems every day

Two logins, two bills, and two places to check before you can answer a client's question.

WITH ONE SYSTEM

The lead, the policy and the commission sit on the same record.

· No re-entering a lead once it's sold

· Follow-up keeps going after the policy is written

· See which marketing turns into paid commission

· One login for you and your agents

UNLOCKED CRM

NEXT STEP

See your whole book in one system

Book a free demo at www.unlockedcrm.ai

ON YOUR DEMO, WE'LL

- Map your current tools to Capture, Convert and Retain
- Show your leads, policies and commissions on one record
- Walk through moving your data over