UNLOCKED CRM

FREE PLAYBOOK FOR INSURANCE AGENTS

Capture. Convert. Retain.

The insurance client lifecycle, step by step: how to catch every lead, close more of them, and keep the client and the commission.

INSIDE THIS GUIDE

1. The full lifecycle on one page
2. The AI tools behind each phase
3. A checklist for each phase

THE LIFE OF A CLIENT

Capture. Convert. Retain.

New lead
Ads, forms, imports

1 Capture
Every lead gets a response

- AI automation builder
- AI outbound caller
- AI chatbot
- AI receptionist

2 Convert
Quote it and write it

- Intake links
- AI quoter
- Quote links
- E-Apps

3 Retain
Keep the client and the commission

- Policy management
- Commission records
- Client portal
- Renewals & reviews

All three phases, one CRM: from first lead to commission paid.

YOUR CHECKLIST

What to have in place at each phase

1 Capture

- Reply to every new lead the moment it comes in
- Have AI call or text new leads before they go cold
- Answer every inbound call, even after hours
- Put follow-up on a workflow, not on memory

2 Convert

- Send an intake link so clients fill in their own details
- Quote from the intake instead of re-typing it
- Send a quote link clients can review on their own time
- Submit the e-app without entering the data twice

3 Retain

- Keep every policy on the client's record
- Track commissions paid and still pending
- Give clients a portal to see their coverage
- Reach out before renewals and annual reviews

UNLOCKED CRM

NEXT STEP

Set up all three phases in one CRM

Book a free demo at www.unlockedcrm.ai

ON YOUR DEMO, WE'LL

- Build your capture workflows with the AI automation builder
- Send your first intake and quote links
- Load your policies and commissions