

# HubSpot for Agents and Brokers

Grow your business with our customized version of HubSpot designed for independent insurance agencies and brokers.

## Why HubSpot for Agents and Brokers?

HubSpot is a full-function enterprise CRM, Sales, Marketing, and Services platform that scales as your company grows.

HubSpot is a horizontal platform used across various industries. This presents a challenge for agents and brokers as customizing HubSpot for the insurance industry can involve a moderate learning curve influenced by your prior experience and technical skills.

As a HubSpot Provider Partner who focuses exclusively on the insurance industry, we have developed a customized version of HubSpot specifically to meet the needs of independent agents and brokers.

HubSpot for Agents and Brokers enables your organization to:

### Accelerate Implementation and User Adoption

Our customizations enable your organization to start using HubSpot effectively and immediately using data from your agency management system.

### Skip the HubSpot Learning Curve

Our out-of-the-box solution includes customizations that remove the necessity of learning how to personalize HubSpot, set up automated workflows, or create reports and dashboards.

### Optimize Your Investment

We have optimized HubSpot by following best practices that will enable you to make the most of the tools you are investing in.

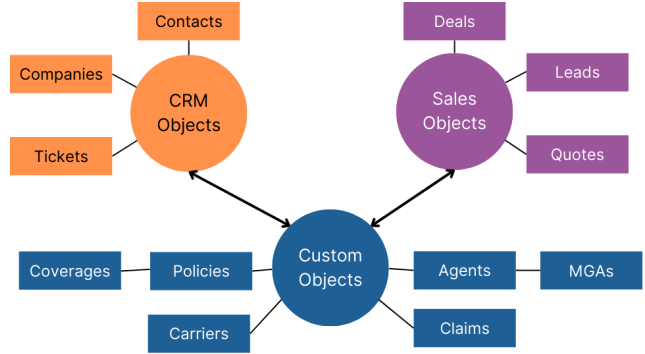


# Customizations

Using the data from your AMS, our insurance industry-specific version of HubSpot can be implemented to increase productivity and revenue.

## Custom Fields and Objects

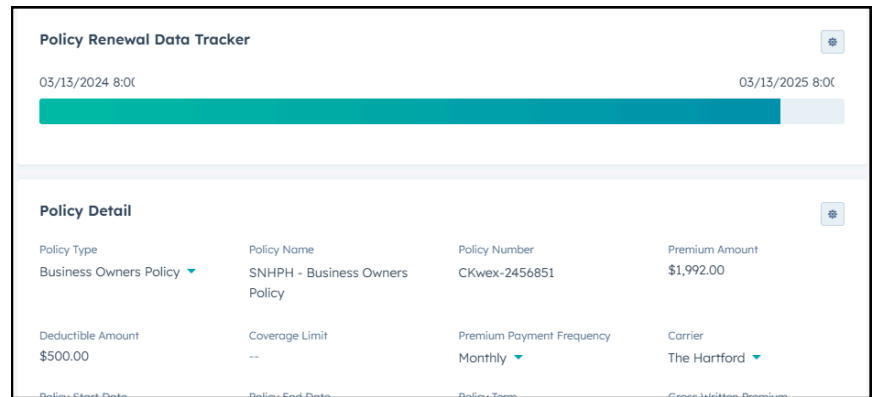
- Custom fields for HubSpot CRM and Sales objects
- Custom objects for personal, commercial and life insurance LOBs.



## User Interface Customizations

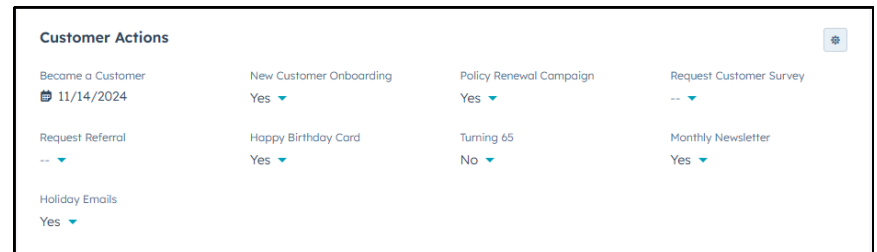
Custom record layouts to meet the needs of agents and brokers for:

- Contacts
- Companies
- Deals
- Policies
- Carriers
- Claims



## Automated Customer Actions

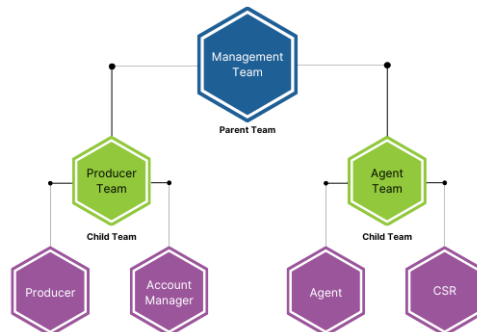
- Policy Renewal Reminders
- New Customer Onboarding
- Policy Cancellations
- Payment Reminders
- And more!



## User Profiles and Permissions

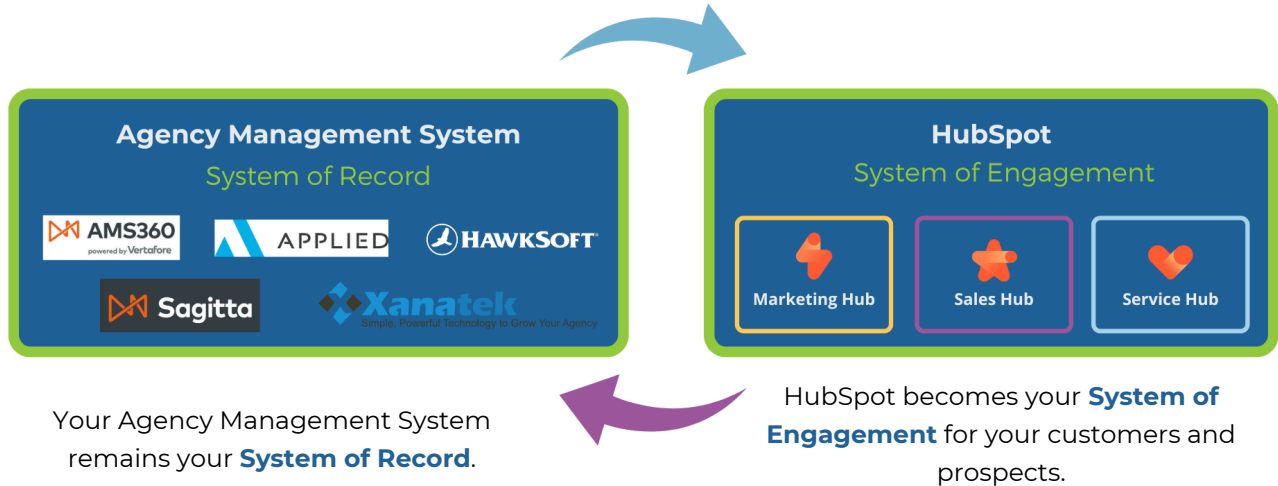
Pre-defined user profiles for optimizing the user experience and configuring functionality to meet the needs of:

- Agency Owners/Senior Management
- Producers and Agents
- Account Managers and CSRs
- Service Center Virtual Assistants



# AMS Integration with HubSpot

Using the data from your AMS, our insurance industry-specific version of HubSpot can be implemented to increase productivity and revenue.



## Pre-Mapped Fields

Our custom fields and objects are pre-mapped to several agency management systems to keep your data synchronized with HubSpot.

HubSpot Field Type	HubSpot Object	HubSpot Property Name	AMS360 Property Name
Date and time picker	Policy	Policy End Date	PolicyExpirationDate
Single-line Text	Policy	Policy ID	PolicyId
Single-line Text	Policy	Policy Name	
Single-line text	Policy	Policy Number	PolicyNumber
Dropdown Select	Policy	Policy Pipeline	
Dropdown Select	Policy	Policy Pipeline Stage	
Single-line text	Policy	Policy Source Details	
Single-line Text	Policy	Policy Source ID	
Date and time picker	Policy	Policy Start Date	PolicyEffectiveDate

## Reports and Dashboards

Pre-configured reports and dashboards using a combination of your agency management system and HubSpot data are available for immediate use.

Policies

Retention

Revenue

Carriers

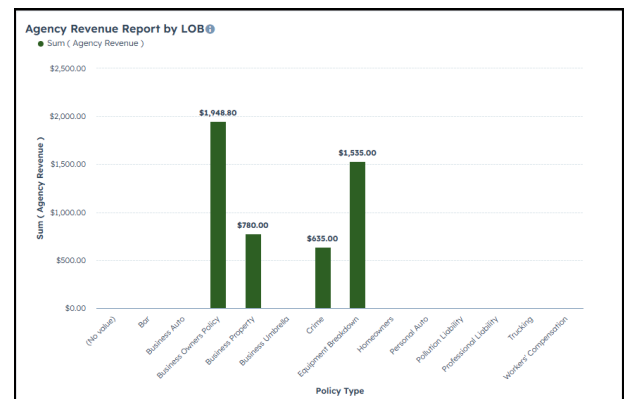
MGAs

Agents

Sales

Marketing

Services



## Use Cases

### Marketing

Cross-sell and Upsell  
Policy Renewal  
Lead Distribution  
Email Marketing

Use HubSpot Marketing Hub to automate campaigns for customer retention, revenue generation, and lead attraction to grow your customer base.

### Sales

Sales Processes  
Proposals  
Playbooks  
Email Sequences

Keep track of potential customers, manage your sales pipeline, and automate your sales processes and reporting.

### Service

New Customer Onboarding  
Customer Surveys  
Playbooks

Leverage HubSpot Service Hub's powerful features and our customizations to enhance the customer experience for your policyholders.

## Featured Integrations

The HubSpot App Marketplace contains over 1,700 options for HubSpot-certified integration apps.

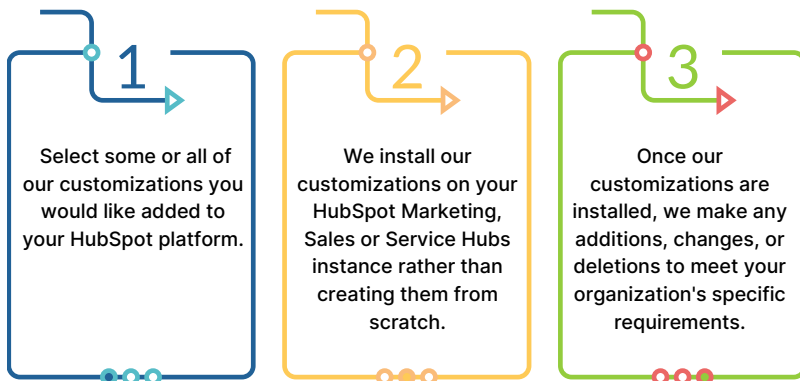
We have listed some of the most commonly used applications by insurance agents and brokers.

[View Integrations](#)

- ✓ **Calling**
- ✓ **Insurance Apps**
- ✓ **CRM**
- ✓ **Sales Enablement**
- ✓ **Email**
- ✓ **Social Media**
- ✓ **Finance**
- ✓ **Website & CMS**

## Our Process

Our customizations for the HubSpot for Agents and Brokers platform are easily uploaded to your HubSpot Marketing and Sales Hubs in three simple steps:



## Next Steps

### HubSpot for Agents and Brokers Consultation and Demo

Whether you are new to HubSpot or an existing customer, click on the button to arrange a consultation and demonstration.

Discover how HubSpot for Agents and Brokers can boost your organization's productivity and revenue.

[Schedule a Demo](#)