

# HubSpot for Agents and Brokers

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

## What is HubSpot for Agents and Brokers?

HubSpot for Agents and Brokers is a customized version of HubSpot Marketing, Sales and Service Hubs that are pre-configured for independent agencies and brokerage firms.

## Use Cases



### Marketing

Cross-sell and Upsell Automated Campaigns  
 Policy Renewal Automated Campaigns  
 Automated Lead Distribution  
 Predictive Lead Scoring  
 Social Media Management



### Sales - The Prospecting Workspace

Automated Sales Processes  
 Sales Proposals  
 Sales Playbooks  
 Email Sequences  
 Call Tracking Software



### Service - Customer Success Workspace

Case Management for Policy Renewal  
 New Customer Onboarding  
 FNOL  
 Customer Feedback Surveys  
 CSR and Account Manager Playbooks

[Learn More](#)

### Custom Fields for Insurers

- 100+ personal line fields
- 100+ commercial line fields
- Agency-specific custom fields

### User Profiles

- Agency Owners
- Agents and Producers
- CSRs and Account Managers
- Virtual Assistants

### Reports and Dashboards

- Renewals
- New Business
- Sales Prospecting Activities
- CSR and Account Manager Activities

### Email Marketing

- New Customer Welcome Emails
- Monthly Newsletters
- Policy Renewals
- Birthdays & Turning 65

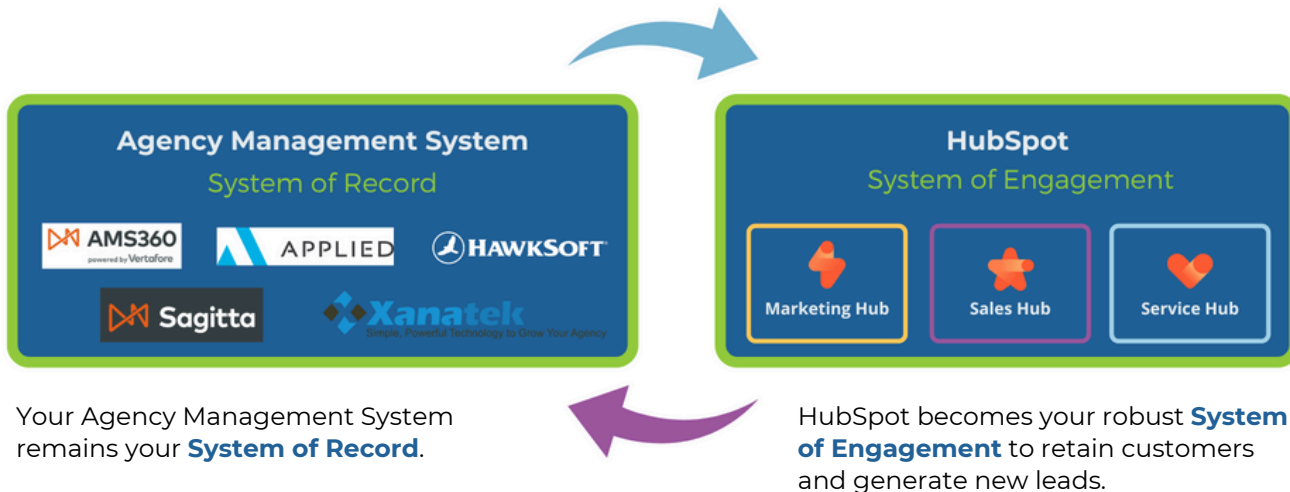
### Automation

- Email Drip Campaigns
- Policy Renewals
- Lead Tracking
- Lead Scoring and Routing



# 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.



## Featured Integrations

The HubSpot App Marketplace contains over 1,500 options for HubSpot-certified integration apps.

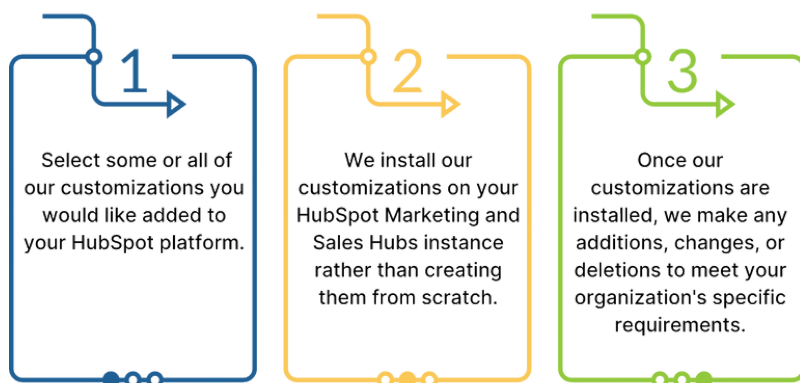
We have listed some of the most commonly used applications by insurance agents and brokers.

[View Integrations](#)

- ✓ Calling
- ✓ CRM
- ✓ Email
- ✓ Finance
- ✓ Insurance Apps
- ✓ Sales Enablement
- ✓ Social Media
- ✓ 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](#)