



# INSURED MINE

#GetSetAutomate



**PLATFORM OF DIGITAL TOOLS  
FOR INSURANCE AGENTS**



**SALES, ENGAGEMENT, ANALYTICS & MOBILE**



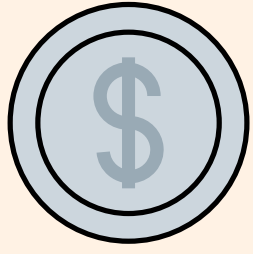
**Visit [insuredmine.com](https://insuredmine.com) for more details**



# INSURED MINE FEATURES

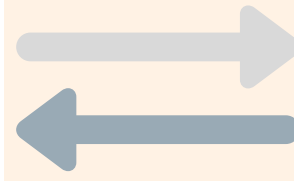
## SALES & CLIENT MANAGEMENT

### Sales/Renewal



Multiple Pipelines for sale & Renewal to get more deals - web or manual to close faster, serve better and track all.

### 2 way - AMS Sync



Integrated with Agency Management System for real time data exchange including - Clients, Deals, Documents, & Activities.

### Checklist



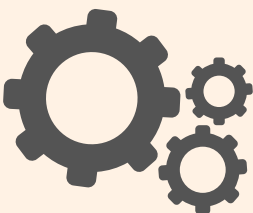
Track subtasks in a deal for repetitive tasks for consistency. Create multiple checklists or automate them from stage to stage.

### Personal Drip



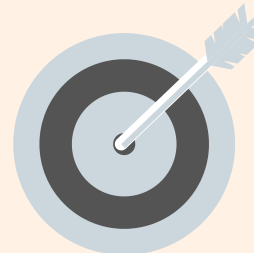
Create customized automated emails/text/task quickly for your clients to engage and deliver value on their terms

### Automation



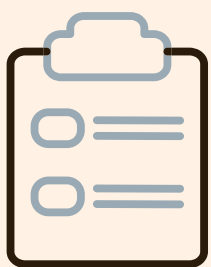
Setup Campaigns with email, text, and cards for triggers to set it and forget it. Triggers will be activated when the business logic is met.

### Goal Management



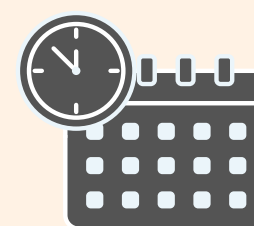
Set goals for Sales team and keep track of their performance, goal vs actual in real time and compare with their team on a leader board.

### Task Management



Build your perfect assembly line and collaboration by allocating task and tracking them so nothing is falling through the cracks.

### Scheduler



No more 5 email back and forth to schedule a meeting. Never get double booked. Automated reminders, timezone detection.

### Service Pipeline



Manage service request as cards in Service Pipeline to ensure all requests are properly and timely responded to by your team.

### Form Builder



Integrate customized forms on your website and connect with your leads efficiently with deal card. Build forms using Drag and Drop.

### Charts & Analytics



Easy to understand business data with interactive visualization. Reports to know more about Agency, Agents, Clients and Deals.

### Forecast



Manage opportunities in your sales funnel to forecast what, when and how you will close. Higher predictability and greater control.





# INSURED MINE FEATURES

## ENGAGEMENT

### Email Campaigns



Design and develop multi stage campaigns for segmented contacts and track contacts response behavior.

### Segmentation



Group contacts by location, policy, demographics, coverage or other attributes for customized & effective communication

### Bulk Text



Send text message as email with higher possibilities of read and response. Manage opt in by user and track report.

### Automation Workflow



Connect with your clients frequently with Workflow automation for referral requests, thank you and client pulse drip.

### Google Review



Power your business with social proof — let your happy customers digitally endorse you and increase conversion.

### Template Builder



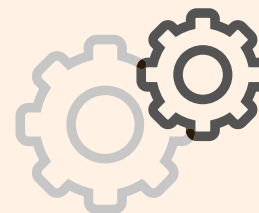
Build beautiful mobile responsive email messages, & newsletters. Fill with awesome content. Send.

### Single Contact Drip



Drip designed with email, text, chat, and reminders to target individuals with your preference of sequence for communication.

### Sales Automation



Pre-define your sales automation process with email drip, task creation, text with new deal, add or stage change.

### Analytics



Engagement Analytics to track user behavior on open, click, bounce, and subscription for segmentation and follow up campaigns.

### Video Integration



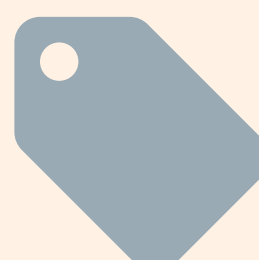
Video is engaging and entertaining. Did you know that including video in an email can lead to open rate increases of 6%?

### Prebuilt Templates



InsuredMine offers 100s of pre-build Insurance specific email & text templates for your campaigns so you dont have to start from scratch.

### Tags



Dynamic tags allows you to insert customer specific information and lets you personalize communication at scale.



# INSURED MINE FEATURES

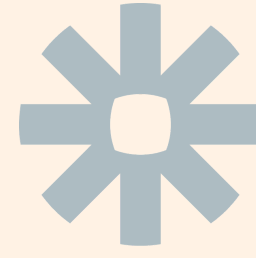
## DASHBOARD & DIGITAL TOOL KIT

### Dashboard



View and understand your data story. Use that knowledge to grow your business, cross-sales & retention.

### Zapier



Leverage the power of Zapier and connect with thousands of other applications for data exchange real time.

### Missing Data



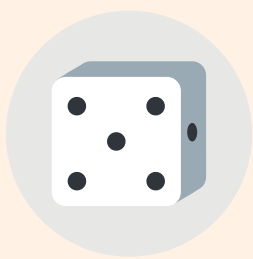
Know what you don't know about your customer data with a click. Identify the gaps and fill them accordingly so you are ready for next comms.

### Daily Highlights



Provides you a high level snapshot of what needs to be done today including activities, tasks, Todo, campaigns, Policy and much more.

### Opportunities



Dig into your current book for opportunities related to cross sale, up-sale, loss deals, or X-dates to add another 25%-30% revenue.

### Client Map



Use Google Map to know where your client clusters are, where you need to market or when to send to geo specific comms.

### Contact 360



Consolidate information about your contacts in full circle and know all you possibly need to know to be the best in your business.

### Mobile App



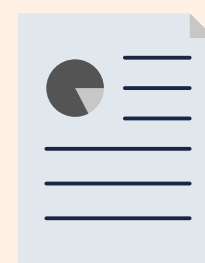
Mobile App brings you closer to your clients by sharing policy information, notifications, reminders as well as option to chat.

### User Management



Follow your org chart to build tiered org in InsuredMine to provide access as needed be it Agent, CSR, Manager or Admin.

### Policy & Carrier Info



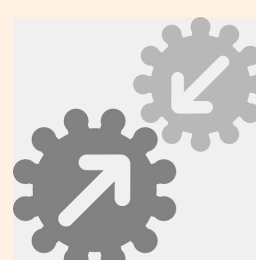
Bring policy and carrier level details in interaction with customer data for deeper dive into risk, appetite and forecasting.

### Single Sign On (SSO)



For enhanced security Implementing SSO via SAML allows user login outside of the CRM and with their Org Active Directory.

### Integrations

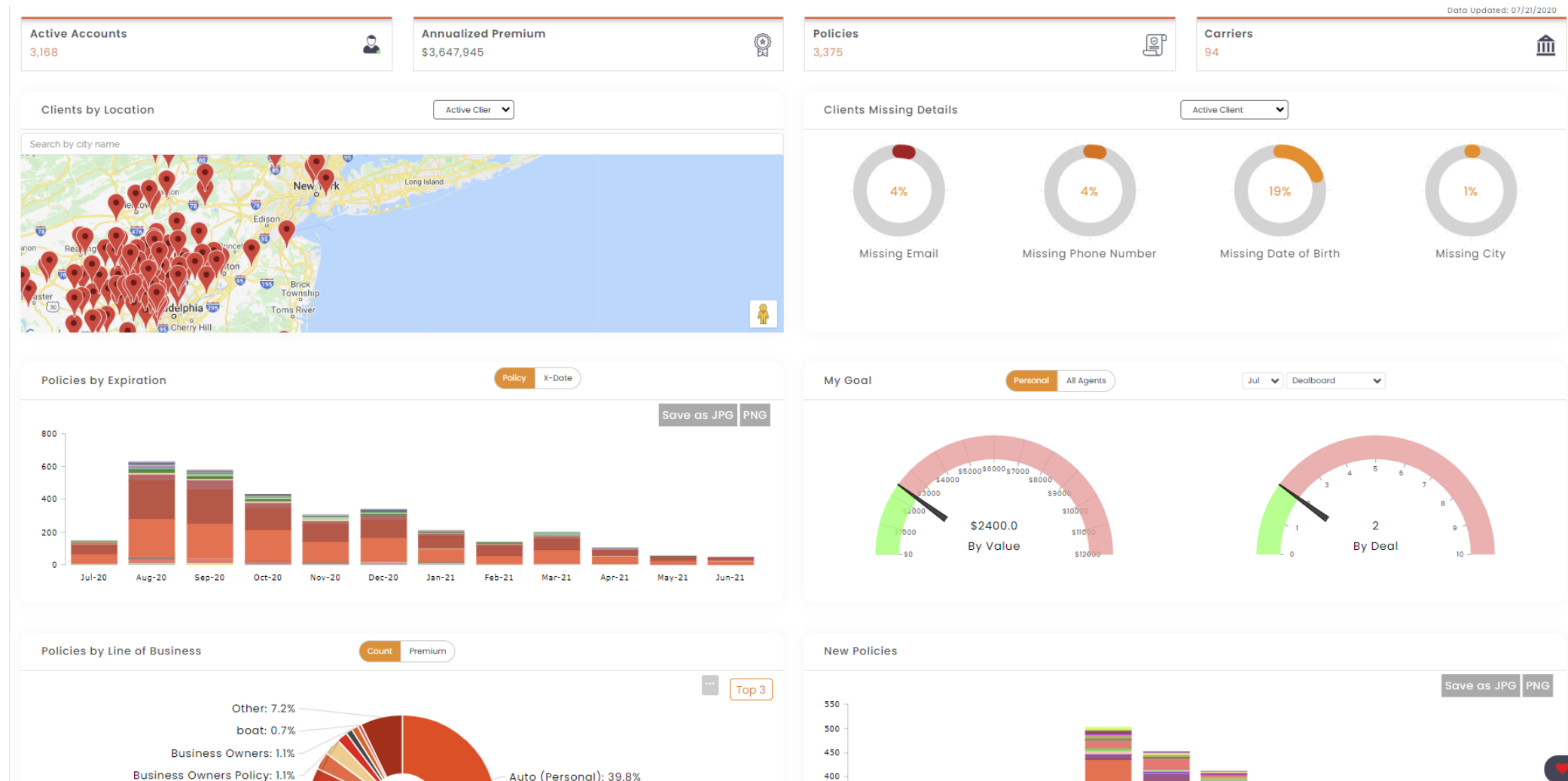


Integrations with quoting tools, phone systems, email, lead sources, hand written cards and much more for seamless experience.





# InsuredMine Product

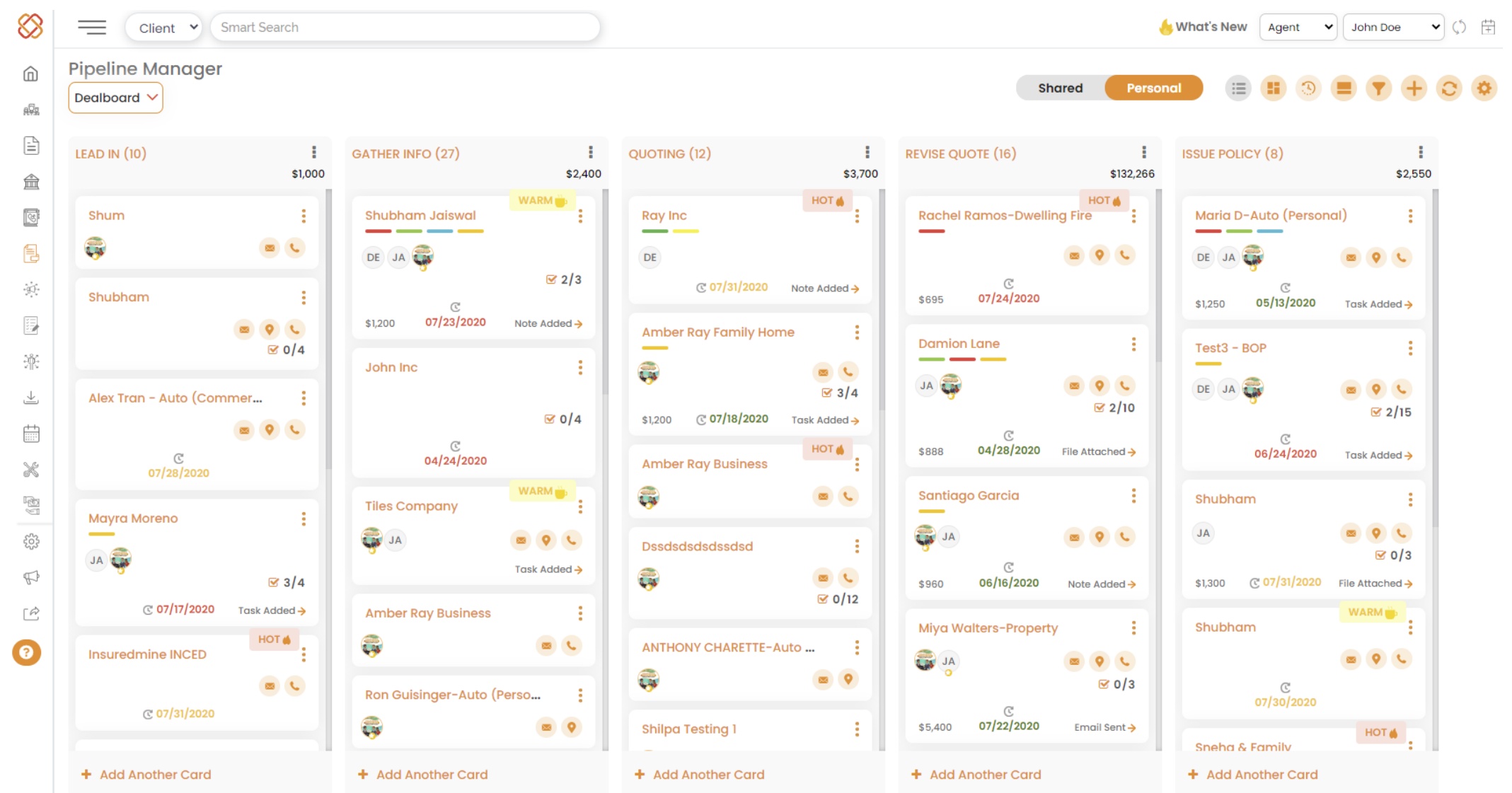


## Agency Dashboard

Captivating overview of your sales

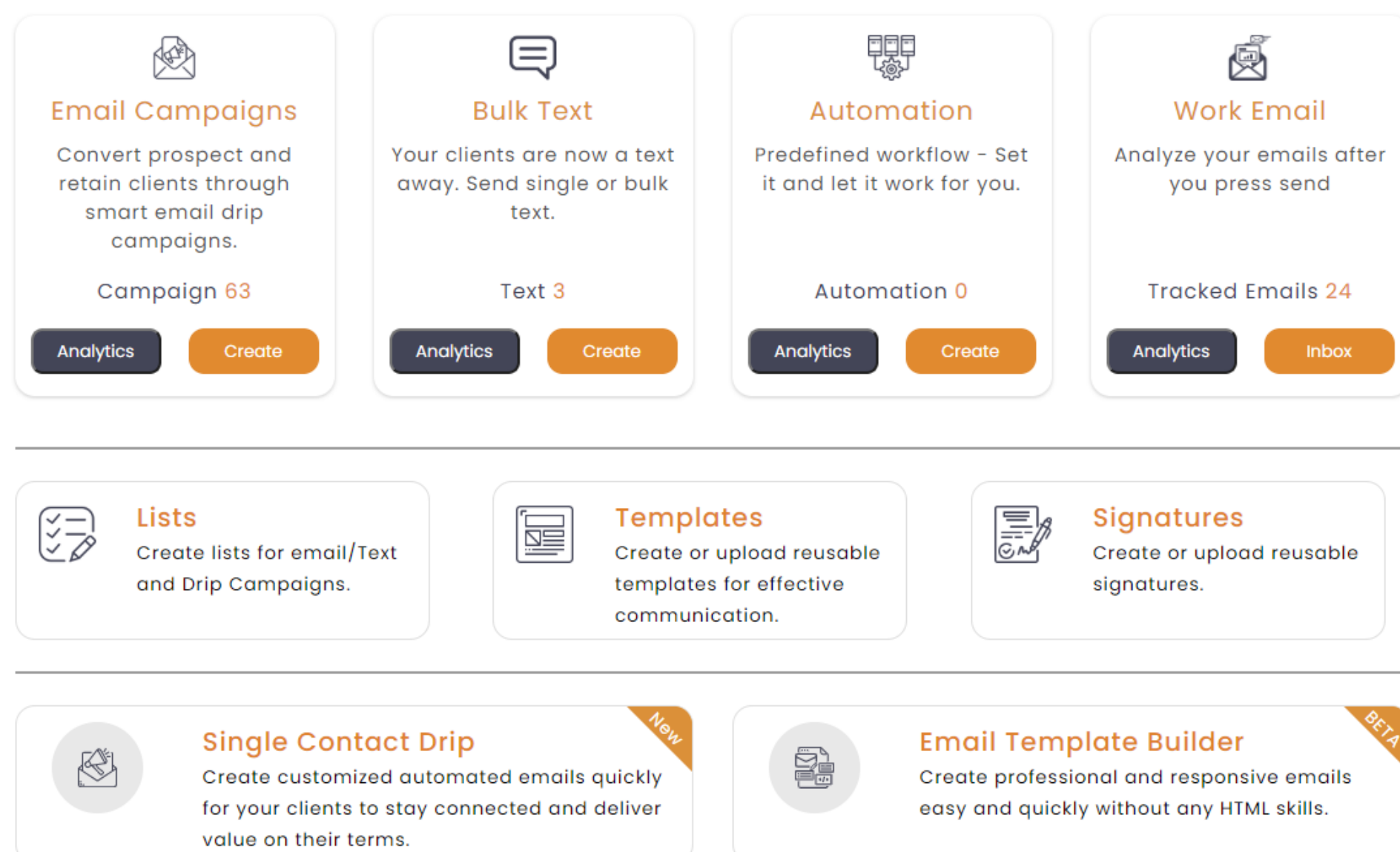
## Pipeline Manager

Track customer journey in the funnel



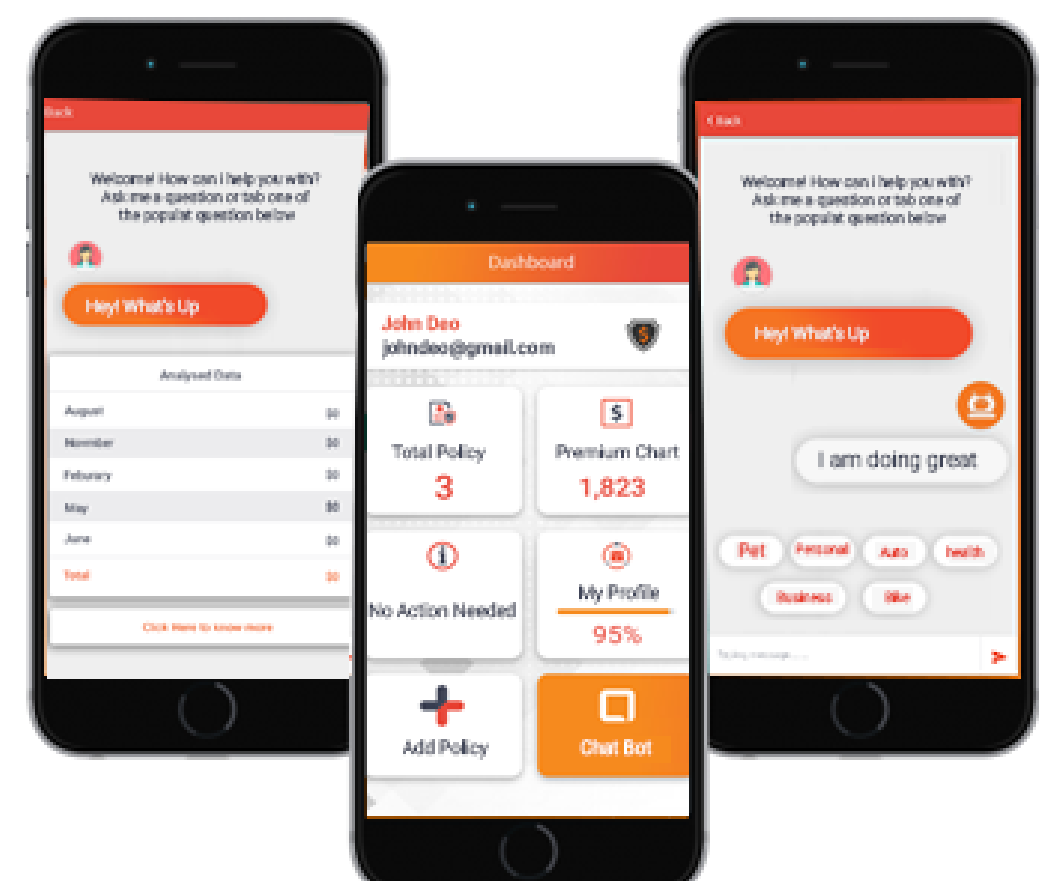
## Engagement Module

Perfect messages at the right time through the right channel



## Mobile App

Stay connected on the go







# Client Testimonial



DAVE CHALLY,  
MANAGING PARTNER  
BARNEY INSURANCE



"We started with InsuredMine a few months back. I have been amazed at how responsive they are to our needs and new ideas. Suggestions we make one month appear as upgrades the next month. I've not seen a tech company this engaged with their front line users. I would highly recommend them!!"



"I would give 10 stars if I could."

"Raution, Shubham, and their entire team have been a pleasure to work with. This InsureTech company is exactly what we have been looking for the past 10 years.

We subscribed to many platforms and finally have come across a platform who integrates with our AMS and who also listens to their customers."



CLIENT REVIEW

Joshua R. Hernandez, CIC  
Partner

 **SOGO**  
Wealth & Risk Management



# INSURED MINE



## Follow Us

### CONNECT WITH US

- (+1) 469 616 1821
- Sales@InsuredMine.com
- Dallas, TX