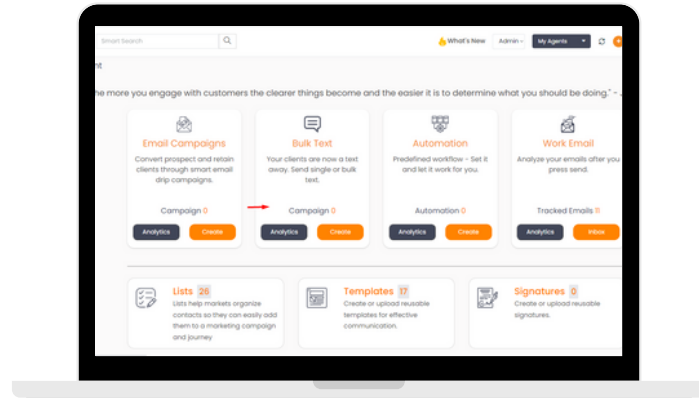# INSUREDMINE ENGAGEMENT MODULE

Smart and innovative content management built for insurance agencies.

With modern content management and a smart workflow designed specifically for insurance, agencies can unleash the power of creativity for their agents. The Engagement Module provides agents with all the tools necessary to do more business while driving consistency and compliance across the agency.

Two ways of communication:

Bulk communication:

Send one message to multiple people at a time.

Bulk communication works for:
- Email Campaigns
- Text messages

Individual communication:

Send one-to-one communications to customers based on specific data points such as their birthday, policy expiration, policy renewal, or when they become active clients.

Readymade templates

Design effective email or text campaigns with the pre-set templates to communicate with the customers and prospects. Templates are a smart and easy way to standardize communication internally and externally. InsuredMine provides a broad category of communication templates, which can be used as-is or modified.

Smart lists

For any sort of bulk communication that agents want to trigger at a certain point in time, they can either upload a list of contacts and select the same for the communication or can create a list out of the book of business based on the active or inactive clients. This will save time and increase efficiency.

Signature

Agents can add a signature with the business details that can be used with every email or text campaign that is set up from the respective account. One can also set their signature as a tag.

Static Lists:

- A Static List will be a snapshot of the list that will be created at a particular time in the business book

Live Lists:

Live lists will keep updating as agents activate or deactivate the clients from the book of business.

A live list is preferable as agents don't have to go back and edit the list again and lose time.

Work email

With work email, one can sync the work email address with the Insuredmine agent portal, which will further enable one to send and receive emails without switching to the actual email service provider.

Real-time insights for continuous improvement

To meet the increasing demand for customer service, eliminate bottlenecks, and make staffing and workload adjustments, managers and executives need a complete view of their business.

With the InsuredMine Engagement Module you can track the following:

- How well are your agents communicating with clients?
- How many leads or prospects are opening and reading your email or text communication?
- How many of your existing clients are responding to the communication you are sending?
- How much time, money, and manpower are being saved as you automate your business communication?

Drip campaigns

A drip campaign allows agents to set and automate a series of communication modes at various stages.

These drips can be sent immediately or can be scheduled for specific dates and times and at a certain interval of days.

Some customers have seen the potential for:

- Improving communication efficiency
- Saving time when setting up communication
- Improving relationships between agents and clients
- Saving money by not purchasing different communication tools

"The more you engage with customers, the clearer things become and the easier it is to determine what you should be doing."

John Russell

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