

ONE PLATFORM TO FIT ALL YOUR AGENCY REQUIREMENTS



About InsuredMine

InsuredMine is an all-in-one CRM platform that assists independent agencies in exponentially growing their businesses and increasing their profitability. It is a one-stop CRM platform that helps you manage your agency business and its daily operations. InsuredMine helps streamline workflows, automate business communications, improve renewals and retention, and drive new business, resulting in increased productivity and a superior customer experience.

Features you need:

Right communications at the right time:

Insuredmine helps agents to set up automated communications through a robust integrated communication flow that includes email and text campaigns.

Increase efficiency:

With Insuredmine Pipeline Automation, you can serve customers faster with guided workflows and a dashboard that reflects your agency's processes.

Data-driven decisions to grow your business:

InsuredMine Sales Reports provide visibility into your business data, with the ability to analyze them and further help you make data-driven decisions.

Consolidate policy documents in one place:

Insuredmine Document Manager helps you to store all the necessary documents in one place, so there is no way of misplacing any of them.

Reconcile policy and premium details:

Save time updating policy and premium data and status information through Pipeline Manager.

Secure and enlist all the contacts and accounts:

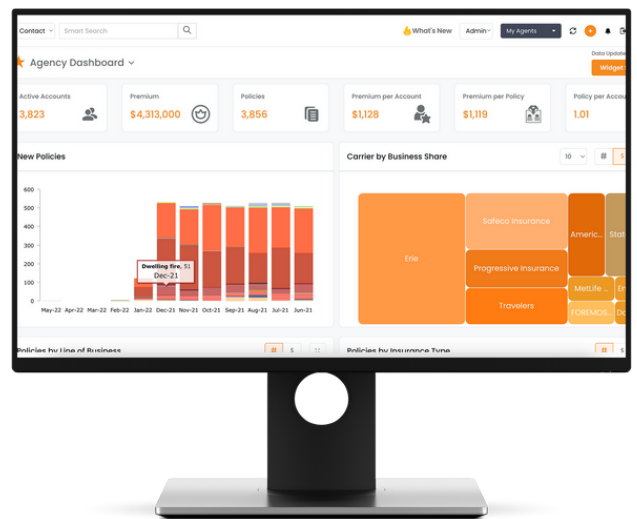
Upload, sort, edit, and delete the lead details and their contacts in Accounts and Contacts and manage them from anywhere.

Sell, Cross-Sell and Win Back:

Get hold of every lead and ensure a recurring business by keeping them engaged through Marketing Automation.

Access client information on the go:

With the InsuredMine Agent Mobile App, you can securely access client information and manage your customer's accounts from your mobile device.



Integrations

AMS integrations:

- AMS360
- QQCatalyst
- Applied Epic
- HawkSoft
- NowCerts

Platform integrations:

PL Rater



Get real-time, comparative rating for multiple carriers that enables agents to close business quicker.

RingCentral



Smart calling tool that lets your sales reps take notes, connect, accept, and log calls automatically.

EZLynx



Helps streamline the agency's workflow through powerful reports and analysis of the agency's production.

Nexsure



Helps to drive efficient insurance processing, superior customer service, and insightful business management.

Twilio



Helps communication through various channels such as text messages, emails, phone calls, and chatbots.

QuoteRush



Allows agents to quickly quote for all insurance carriers from a single-entry screen.

Thanks.io



Get a step closer to the clients by sending digital handwritten cards.

Lightspeed



Supports call recording and reviewing past prospect records without any phone installation.

Zapier



Connect your daily use apps with InsuredMine through Zapier.

QuoteWizard



Get real-time insurance leads, live transfer calls, and online click solutions to connect agents and carriers.

Tranzpay



Allows effortless insurance payments from your customers.

BenefitPoint



Helps agencies and brokerages of all sizes with revenue tracking, prospect management, and financial reporting.



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