Scaling Companies with HubSpot

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What You'll Learn Today:

❖ Insurance industry language & important context

❖ Operational challenges & understanding the landscape

❖ Strategy for selling to the insurance industry

❖ How to approach these projects

❖ Building a winning demo and how to "wow" the insurance industry

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Speaking Their Language:

- ❖ Producer/Agent/Advisor
- ❖ Carrier
- ❖ Brokerage & Agencies
- ❖ Referral Network

- ❖ Cross-Selling
- ❖ FNOL (First Notice of Loss)
- ❖ Subrogation
- ❖ Policy Tracking

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Types of Insurance Companies

Direct Insurance Companies

Reinsurance Companies

Excess & Surplus (E&S) Lines Insurers

Self-Insurance Groups

Direct-to-Consumer Insurance

Key Ecosystem Stakeholders

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- Insurance Carriers (Underwriters)
- Retail Brokers & Agents
- Wholesale Brokers
- Managing General Agents (MGAs)

Types of Coverage

Auto

Homeowners

Renters

Life

Health

Dental

Vision

Disability

Long-Term Care

Umbrella

Commercial Property

General Liability

Professional Liability

Workers' Compensation

Cyber

Product Liability

Event

Bonds (Surety, Fidelity, etc.)

Construction

Commercial Auto

Business Interruption

Directors & Officers

Key Person

Employment Practices Liability

Technology Errors & Omissions

Media Liability

Crime

Environmental

Title

Trucking

Operational Challenges
Managing Marketing, Sales, and Customer Data

- Siloed departments create disconnected data

- Traditional vs modern

- Lack of a centralized CRM

- Data segmentation

- Strict industry regulations

How the Fragmented Industry Affects Adoption

- Multiple stakeholders -> complicated adoption

- 1099 brokers access & hesitancy

- Partial adoption raises CRM value concerns

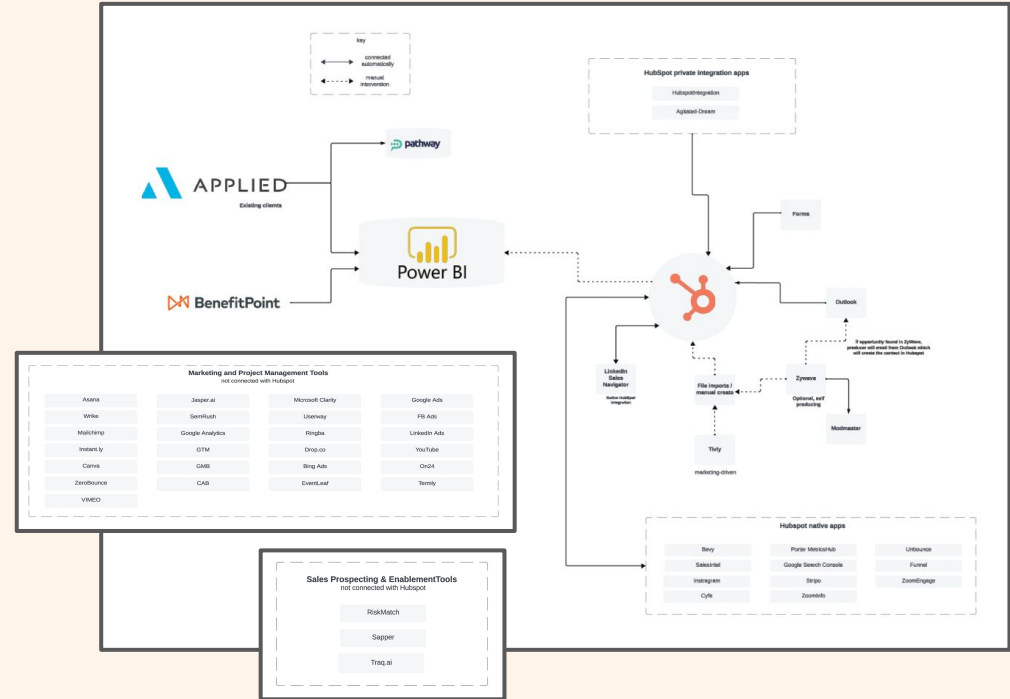- Leadership hesitates due to data access issues

Insurance Tech Stack

Common CRMs:

- Applied EPIC (AMS)
- Salesforce
- HubSpot

Other software:

- AMS + CRM
- MA tool
- Sales Prospecting Tool
- Commission Tracking
- Quoting tools

Insurance Industry Problems:

Traditional vs Modern Sales
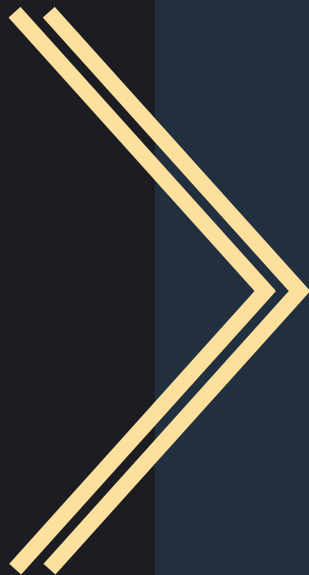
Fragmented Industry

No centralized CRM

Data Segmentation

Limited Pipeline Visibility

Strict Industry Regulations

Insurance Industry Solution:

A well-executed CRM transformation unifies data, streamlines workflows, and improves forecasting.

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Top 6 Industry Trends

**What's driving CRM adoption in the industry?**

1. **Data-Driven Decisions**: Real-time insights for better forecasting

2. **Automation:** Adopting workflows, improve efficiency

3. **Regulatory Compliance:** Ensures secure, trackable documentation

4. **Customer Expectations:** Centralized data = better service

5. **Lead & Sales Visibility:** Tracks pipelines, automates follow-ups

6. **Embedded Growth:** Manages partnerships and policy sales

SALES STRATEGY

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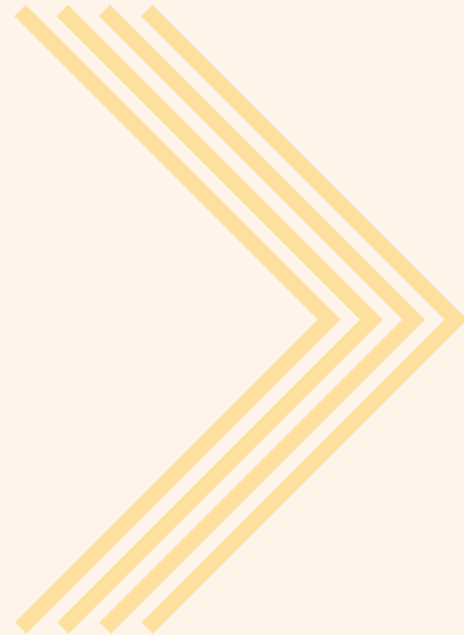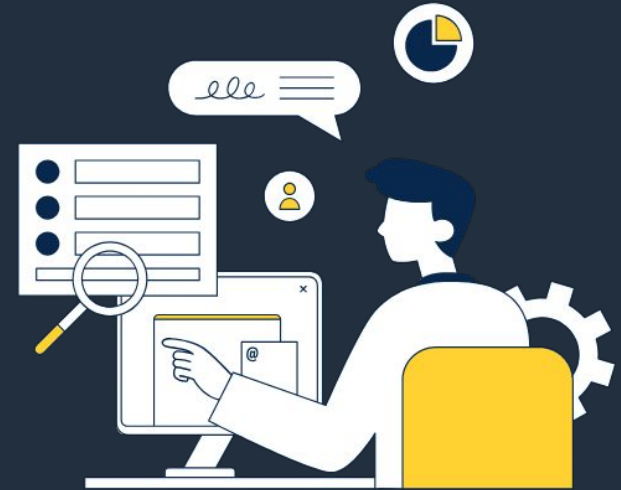
Key Decision-Makers & Their Objections
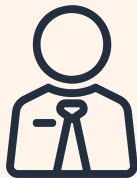
Chief Growth Officer

Our advisors won't use it.
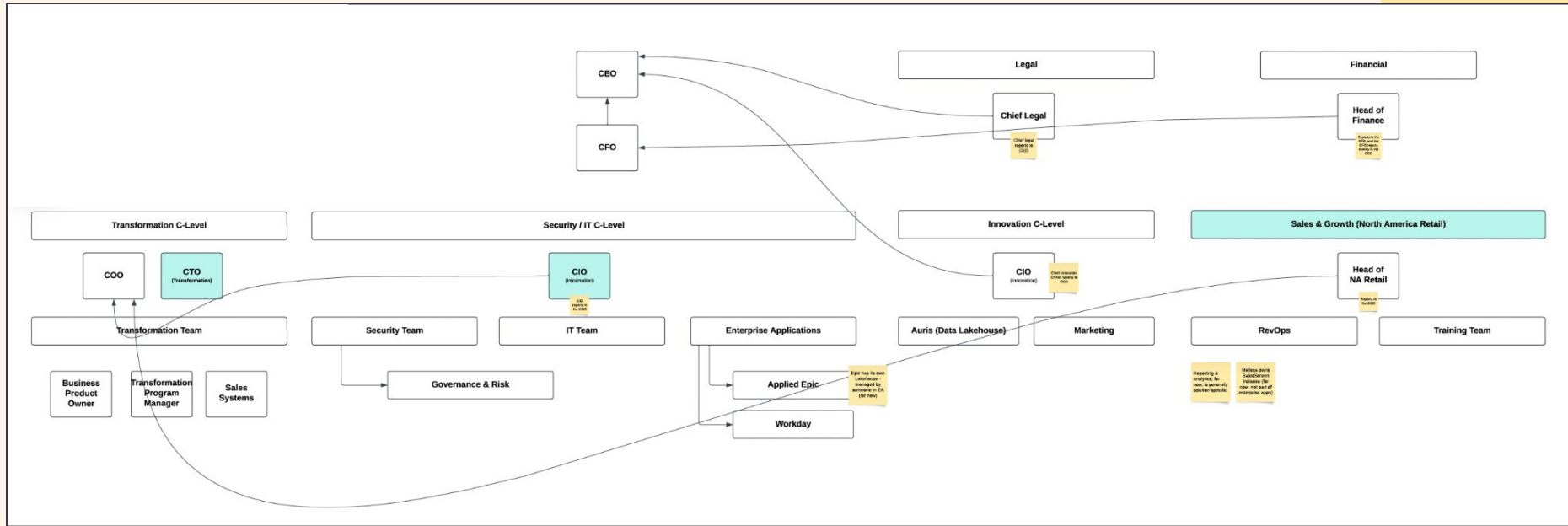
VP of Marketing CMO

Managing & maintaining concerns.

VP of Sales CRO

Will this actually increase sales?
Even if our advisors struggle using it?

Complex Team Structure

Handling Objections

Adoption $\longrightarrow$ Show it's easy to use and how it drives growth

Cost $\longrightarrow$ Position as revenue generator, not an expense

Effectiveness $\longrightarrow$ Highlight real results, benefits, and ease of use

Perceived Effort to Switch $\longrightarrow$ Reduce friction with phased approach & integrations

How to think through ROI analysis

Example:

- Total Software Spend: $1,800,000
- 1,000 Agents
- Average policy: $2,000
- Increase of 5 policies per month

Potential Business Impact:

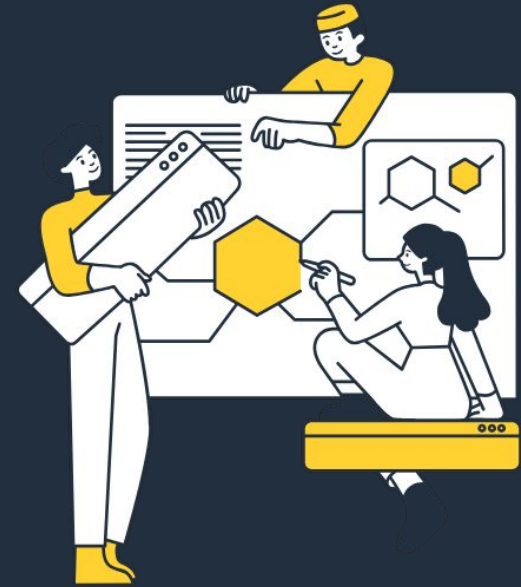- $150/month per producer
- $10,000/month additional revenue
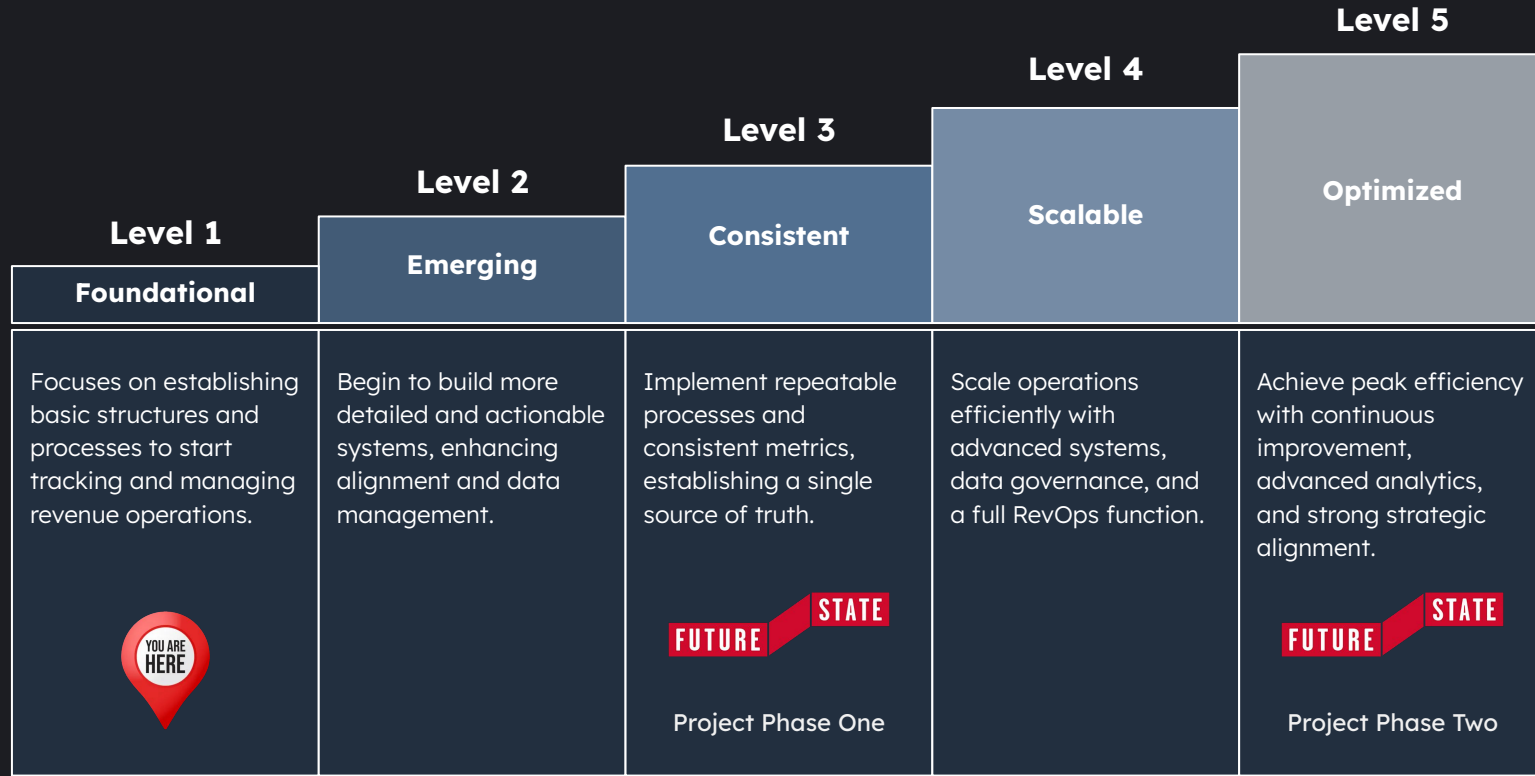
$10M

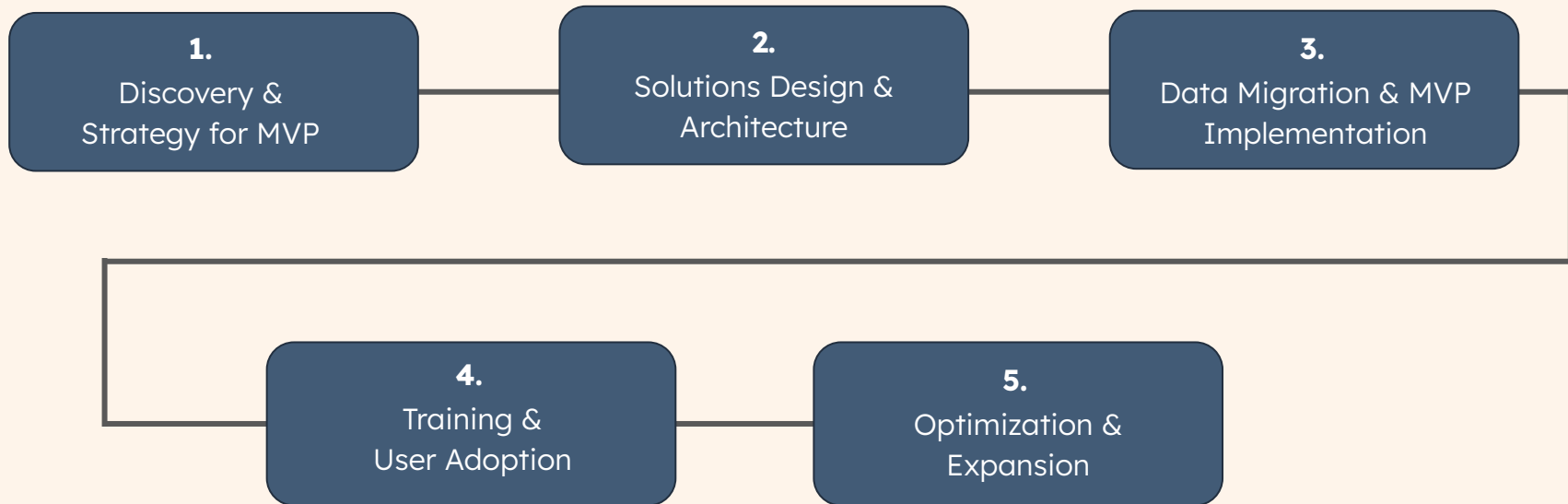**Increased Revenue**

456%

Return on Investment

PROJECT APPROACH

CRM Maturity Model

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Level 5

Level 4

Level 3

Level 2

Level 1

Foundational	Emerging	Consistent	Scalable	Optimized
Focuses on establishing basic structures and processes to start tracking and managing revenue operations.	Begin to build more detailed and actionable systems, enhancing alignment and data management.	Implement repeatable processes and consistent metrics, establishing a single source of truth.	Scale operations efficiently with advanced systems, data governance, and a full RevOps function.	Achieve peak efficiency with continuous improvement, advanced analytics, and strong strategic alignment.

YOU ARE HERE

FUTURE STATE

Project Phase One

FUTURE STATE

Project Phase Two

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A Strategic, Phased Approach for Success

1.
Discovery &
Strategy for MVP

2.
Solutions Design &
Architecture

3.
Data Migration & MVP
Implementation

4.
Training &
User Adoption

5.
Optimization &
Expansion

Why HubSpot Wins

Easy to Use & Adoption

Seamless Integrations

Unified Customer View

Lower Total Cost

Scalable & Flexible

Faster Implementation & ROI

By keeping it simple and showing immediate value,
you build momentum for broader adoption.

A WINNING DEMO

Deal Pipeline

Highlight:

- Ease of use
- Data entry
- Visibility

Reporting & Forecasting

Highlight:

- **Weighted Revenue Forecasting**
- **Sales Goals**
- **Activity Tracking**

Sales Prospecting Workspace

Highlight:

- All-in-one hub
- AI-powered insights
- Automated follow-ups
- Real-time lead tracking
- Simplified reporting
- Easy meeting scheduling

Tying It All Together

Mastering the Industry

Know the terminology, key players, and sales process to build trust and close deals.

Industry Challenges

Solve siloed data, compliance hurdles, and inefficiencies with the right CRM.

Optimizing the Tech Stack

Integrate AMS, automation, and sales tools to streamline workflows and boost productivity.

Driving CRM Adoption

Get leadership and brokers on board to ensure full adoption and impact.

Proving ROI & Impact

A data-driven rollout proves CRM value by increasing sales and retention.

Why HubSpot Wins

Easy to use, scalable, and seamlessly integrated—built for insurance growth.

Q&A

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WORLD

- Personal and commercial
- 2,500+ employees
- $1.5 billion in revenue (estimated)

WFG National Title Company
a Williston Financial Group company

- One of the top 6 national title underwriters
- 1000+ employees
- $240 million in revenue (estimated)

Cover Whale

- Commercial auto
- 110 employees
- 15 million in revenue (estimated)

ACRISURE®

- 6th largest insurer worldwide
- 17,000 employees
- 5 billion in revenue (estimated)

VAULT

- Focus: high net-worth individuals
- 213 employees
- ~250 million in revenue

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Talk with me!