THE AUTOMATION HANDBOOK FOR INSURANCE AGENTS

CHAPTER I

Introduction

In the fast-paced world of insurance, you're juggling a lot of tasks every day. Managing client information, sending reminders, keeping track of policies - it's a never-ending to-do list. You might have heard about something called "workflow automation" and thought, "That sounds complicated!" But guess what? It's much easier than it seems, and it could be the solution to making your work life a whole lot simpler.

Workflow automation might sound like something out of a sci-fi movie, but it's actually a practical and user-friendly tool that can be your new best friend. It's all about connecting the tasks you do every day and setting them up to *run automatically. Think of it as setting up a row of dominoes; once you tip the first one, the rest follow in a smooth and orderly fashion.*

Imagine not having to manually enter data or remember to send that follow-up email. With workflow automation, those repetitive tasks can be handled without you lifting a finger, giving you more time to focus on what truly matters: building relationships with your clients and growing your business.

In this e-book, we'll break down the seemingly complex world of workflow automation into easy-to-understand pieces. We'll guide you through how to set up automated processes that suit your specific needs, without all the tech jargon. Whether you're a tech newbie or a seasoned pro, we've got you covered. It's not as overwhelming as it sounds, and by the end of this journey, you'll wonder how you ever managed without it!

CHAPTER II

Laying the Groundwork

Workflow automation can transform how you manage your daily tasks, but it requires careful preparation to be effective. Before you can begin to automate, it's essential to understand your current processes, identify where your time goes, and pinpointing the bottlenecks that may be hindering your efficiency.

The first step is to take a good look at what you're doing manually. Start by creating a matrix and group your tasks into three categories: urgent & must-do, non-urgent & must-do, or simply non-urgent nice to-dos. This step helps you see the big picture and identify what tasks are essential and what can be automed.

Once you've grouped your tasks, it's time to think about the time you spend on each. What is the output or return on that time? How many hours could you be spending with clients instead of on repetitive tasks? And here's a big one: much money are you missing out on by not automating these processes? By understanding the time and value associated with each task, you can prioritize what to automate first. It's like figuring out which puzzle pieces to connect first to make the picture come to life.

Now, the next step in the workflow automation groundwork is to identify where you're experiencing pain in your day-to-day activities. Where are bottlenecks, the places where things get stuck or slow down? Or -- get missed completely? By pinpointing these problem areas, you can target your automation efforts where they'll have the most impact, turning those daily frustrations into seamless processes.

CHAPTER III

Practical Automation

Some of the most practical automation are processes we would never dream of automating! In this Chapter, you'll find examples and details on practical automation for your business. These examples will illustrate how automation can be applied across various aspects of the workflow, enhancing efficiency, accuracy, and responsiveness. By identifying the processes that align with your specific needs and challenges, you can tailor automation to provide the most significant benefits to your business.

We will provide recipes for automation ideas by leveraging a tool known as Zapier. You can create an account for Zapier by visiting www.zapier.com.

Before we provide the recipes for success, we'll need to cover some terminology to help you understand how flows work. Zapier automates your workflows using triggers, actions, and conditions. A *trigger is an event that starts the "zap" or automation, and an action is an event a zap performs.* You *can create complex or multiple actions within automation by including* conditions, *which simply means the action will only take place in the event the condition has been met.*

Here's *an example*: *When a new lead form is completed on my website (trigger), then create a new customer profile in my* CRM *(action).*

To *make it more defined and add in conditional logic, the recipe would look like this:* When *a new lead form is completed on my website (trigger), and if the* State *is* California, *then create a new customer profile in my* CRM *and assign the lead to* John Smith, *a licensed sales agent in* California.

Adding Leads to your CRM

By now, insurance agents should have chosen the best customer relationship management tool (CRM) for their unique business needs. Some of the most common CRMs for insurance agents include AgencyBloc and MedicareCENTER.

If you're running Facebook ads or collecting permission-to-contact (PTC) forms on your website, live chats/customer support on your Facebook business page, Google My Business page, or your website, or from paper permission-to-contact documents collected at your events, you can easily automate the transmission of your data - or simplify the process of getting prospects into your CRM.

We'll touch on multiple CRMs to ensure you're equipped with the process of adding leads, growing your client email list, collecting documents, client onboarding, support, and client retention.

AgencyBloc

Some common triggers that are supported include:

- *When an activity, individual, group, or policy is created*
- *When an activity, individual, group or policy is updated*

Supported actions include:

- *Create new activity, individual, group, policy*
- *Get activity, individual, group, policy ID*

"Getting an ID" is how you can ensure a specific item is updated. Most systems have unique identifiers or "IDs" to prevent new entries from being created, and allowing you to update existing data in your systems.

To transfer data from one system to the next, you'll also need to "map" the data. Meaning you'll want to ensure that the first name from Facebook leads, for example, is deposited into the first name field in your CRM.

TRIGGER

When a new lead is created

ACTION

Create a new individual in AgencyBloc and assign {Agent Name} as the servicing agent

ACTION

Add new email address to {name of list} as a subscriber

ACTION

Get ID for new individual in Step 2

ACTION

Create new activity for ID in Step 3 for Servicing Agent

This would be a common recipe you can use to get clients into your CRM from a Facebook Ad you created. Taking it a step further, you would add this prospect to your email marketing list, and notify the servicing agent that a new lead was created and assigned for them to work.

Other CRMs

While Zapier connects to over 4,000 applications, not all CRMs allow for "zaps" to send data into their systems. In the event you have a CRM that does not connect with Zapier, there's no room for concern. You can still automate a lot of the process. For example:

TRIGGER

When a new lead is created

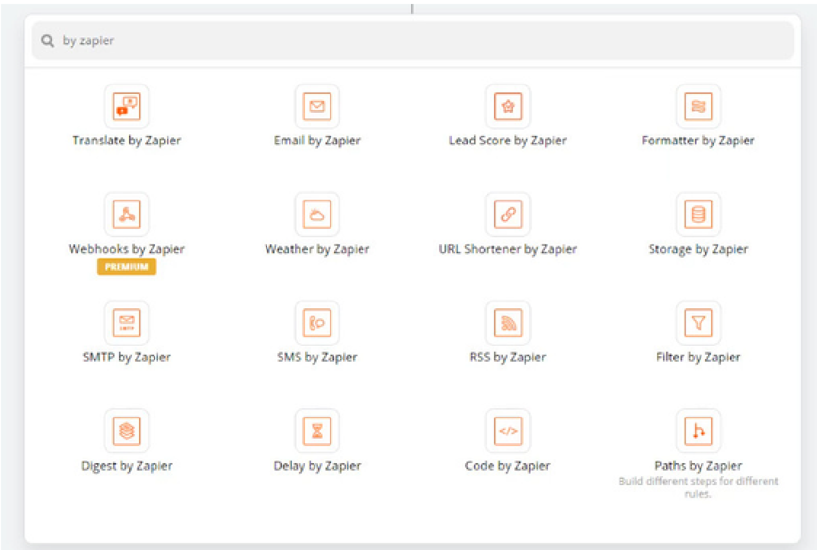
ACTION

Create a new row in Google Sheets

You can ensure to map all of the data you collect from the lead forms into the correct column in your Google sheet. While the next step of importing the file into your CRM is manual, it's still saving you time from downloading a raw file from Facebook and formatting it to be able to import into your spreadsheet. You'll want to ensure that your Google sheet is formatted ahead of time.

Marketing & Lead Generation

In the last section, we talked specifically about Facebook Ad leads and automating those into your CRM. Let's talk about other components of lead generation and how you can automate several processes for lead scoring, phone number and email validation, and cross-posting on your website blog and social media.



Zapier provides you with built-in tools to help you add extra layers of functionality to your workflows and process automation. You can see some examples from the screenshot above.

Filters and paths can be used for conditional and branching logic so your Zaps continue only when certain conditions are met. In the recipe below, we'll walk through adding a lead score action using the built-in feature.

TRIGGER

Invitee Created in Calendly

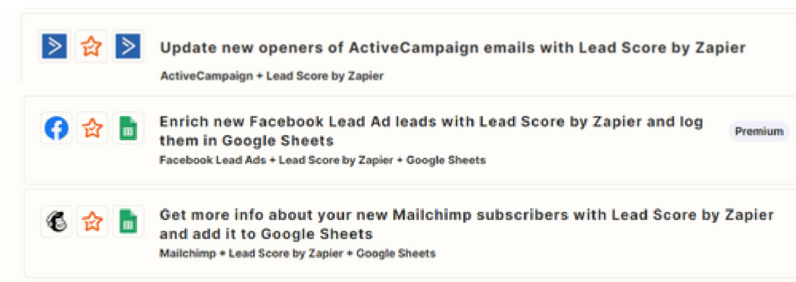
ACTION

Find Person and Company Information in Lead Score by Zapier

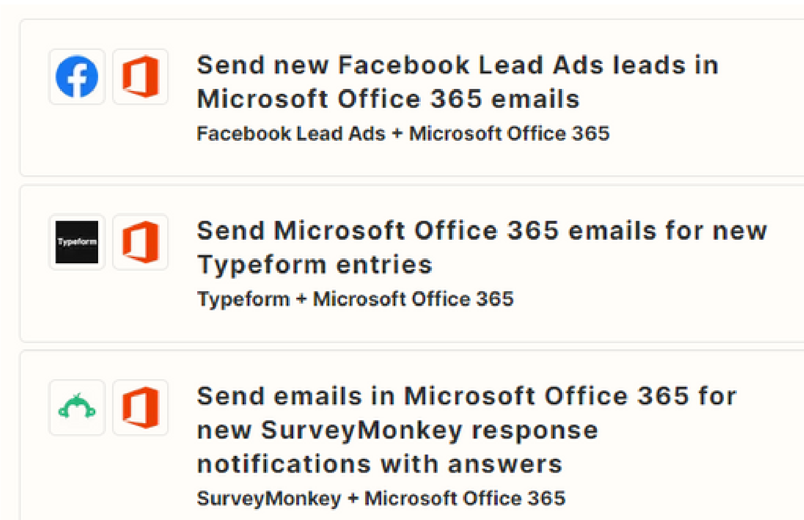
ACTION

Create Multiple Spreadsheet Rows in Google Sheets

This recipe takes any prospect who schedules a Calendly meeting with you and looks up their email address using MadKudu.com. Some additional recipes you can use with lead scoring include:



When it comes to managing the leads you generate, you likely spend a lot of time making the first contact with the new prospect. You don't want the lead to grow cold so you need to act fast, but how much value are you bringing every time you spend copying a template to send out? You can skip all that by using the recipes below to send an email from Microsoft 365 to a new lead no matter how they first contacted you. You can personalize the email in the email step based on information in your permission to contact (PTC) form, referring to the lead by name and referencing any selections they made.



Client Onboarding

The client onboarding process is crucial for reducing churn and ensuring long-term customer satisfaction. By providing a seamless and efficient onboarding experience, insurance agents can set the stage for a successful client relationship. Automating the collection of client information, document submission, and initial communication can save significant time.

Structuring your client onboarding workflow is crucial to make sure you have a smooth and successful onboarding process. After all, even though the enrollment has been submitted, it may still need to become active. Here is the process of automation you can use following the enrollment of your client in their insurance policy.

Let's take a look at a recipe for success when it comes to client onboarding.

TRIGGER

When a new policy is added into AgencyBloc

ACTION

Create a new 'Congratulations on your new health plan" card to be sent by thank.io

ACTION

Add new email address to {name of list} as a subscriber

ACTION

Send 'Thank you for enrolling' email

ACTION

Delay 30 days from today's date

ACTION

Send "30-Day Follow Up Email"

ACTION

Delay 60 days from today's date

ACTION

Send "60-Day Follow Up Email"

Client Retention

Automation is essential for follow-ups and nurturing your clients effectively. It helps you provide timely and relevant information to your clients and keeps you top of mind throughout the year.

TRIGGER

Find individual record

ACTION

Format date of birth to output MMMM

ACTION

Continue if month of date of birth is equal to this month

ACTION

Send birthday card

While we are using AgencyBloc as the initial trigger, you can also create the same process using a Google spreadsheet, or any other CRM, if open API is available. For CRMs without built-in connectors, you can leverage the webhooks feature.

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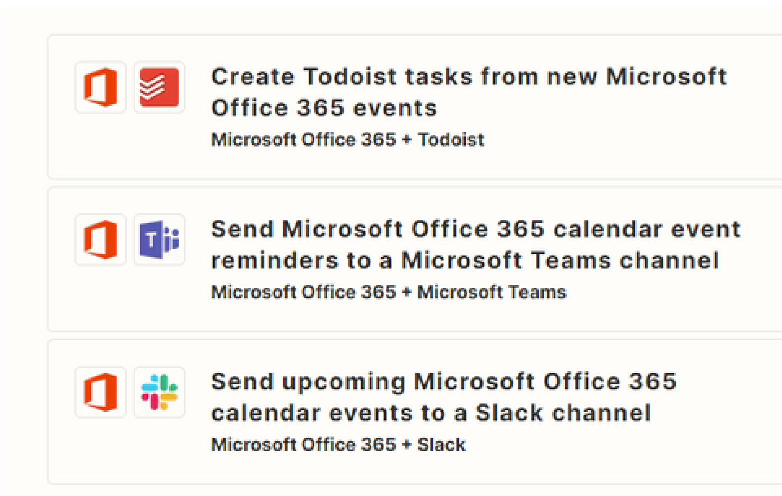
Productivity

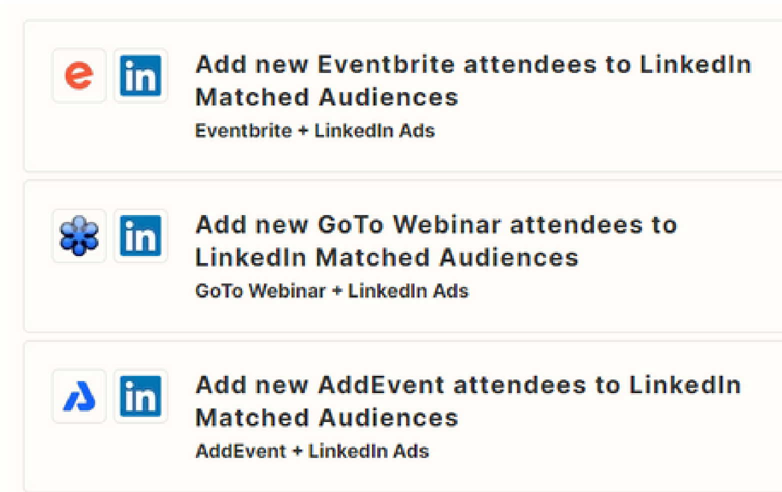
Our brains can only handle so much--and that's why reminders and to-do lists exist. If you often need reminder emails (or send them) regularly, Zapier can do that for you.

If you need reminders on a more specific schedule, say when a meeting or an appointment comes up? You can use a Zap to create a to-do item or other preferred reminder method whenever there's a new event on your calendar.



Post-Event Networking

We are always looking for ways to stay connected in our communities and with prospects. If you host virtual events, you can continue to nurture by adding them automatically to a segment in LinkedIn Matched Audiences.



These are just a few recipes to get you started with staying plugged in with attendees for events you host; whether they're consumer-facing or events for the community in an effort to form strategic partnerships.

CHAPTER VI

Next Steps

"If you always do what you've always done, you'll always get what you've always got." - Henry Ford

I hope this handbook guides you in the right direction to move your insurance agency business workflows toward automation and greater productivity.

Let us know if these steps were helpful in migrating your manual processes to automated processes. Feel free to share your experiences with us by emailing jessica.adkins@agentpipeline.com.

Thank you,

Jessica Adkins

Jessica Adkins

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