



# Modernizing Insurance Operations

*Faster Agent Response, Better Customer Experience*



# The New Reality of Insurance Go-to-Market

The insurance customer has changed.

They want **quick quotes, easy access to agents, and seamless service** from start to finish. And if they don't get it, they move on.

That shift has put pressure on go-to-market teams in every part of the insurance business. Marketing, sales, operations, and IT are all expected to respond faster, personalize engagement, and deliver on revenue and retention goals.

At the same time, they're juggling outdated systems, complex team structures, and pressure to keep up with faster, more agile competitors.

## **Most GTM processes weren't built for this environment.**

Manual handoffs slow things down. Siloed data leads to missed follow-ups and duplicate work. And, legacy systems make it harder to adapt when the business grows or changes direction.

Insurance teams need a better way to connect prospects to the right agents, route inquiries quickly, and create an exceptional experience across the policyholder journey.

### **This ebook will help you:**

- ✓ Identify where GTM processes break down and what it's costing you
- ✓ Improve agent response time without adding headcount
- ✓ Build cleaner, more connected data inside your CRM
- ✓ Scale your operations without losing visibility or control
- ✓ Create a faster, more personalized experience for policyholders

**Modern insurance teams move fast.  
This is how they do it.**

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# Executive Summary

The speed and accuracy of your internal operations processes directly shape how customers experience your brand. This ebook outlines where common breakdowns occur and how to fix them using smarter systems and more responsive workflows.

## Where Things Go Wrong

First, many insurance teams still rely on manual handoffs. This slows down agent response time and creates confusion about who owns what. Next, data issues like duplicate records or disconnected accounts make it harder to respond with context. Then, hardcoded workflows limit your ability to adapt when your team grows, launches new products, or goes through an acquisition.

### What High-Performing Teams Do Differently

- ✓ They route inquiries based on real business rules like license type, region, or product
- ✓ They maintain clean data so that everyone works from the same source of truth
- ✓ They support the full policyholder journey—not just new sales but also renewals, service, and claims
- ✓ They adjust workflows without needing to rebuild their entire system

### Why It Matters

When you fix your internal operations, agents respond faster, teams work more efficiently, and customers get a smoother experience. These small shifts compound over time, driving better retention, stronger referrals, and clearer insight into what works.

LeanData supports this kind of operational transformation. It helps insurance organizations automate inquiry routing, improve data quality, and adjust workflows with ease so you can move faster without sacrificing control.

# Where Insurance Workflows Break Down

It doesn't take much for a well-designed insurance process to fall apart.

One delayed follow-up or a misrouted lead can slow everything from quote generation to claims support. When this happens repeatedly, it creates frustration for both agents and policyholders.

## Leads Don't Reach the Right Person Fast Enough

Many teams struggle with getting leads to the right person. A lead might come in through a web form, a broker, or a referral. But without clear routing rules, it can sit untouched or end up with someone who can't help. That delay can cost you the deal.

## Teams Lose Visibility After the Handoff

Disconnected systems make it hard to track what happens after the handoff. Sales might not know if the lead received a quote. Marketing might not know if the lead became a policyholder. As a result, teams work from incomplete data and often duplicate efforts.

## Complex Team Structures Add More Friction

The structure of most insurance organizations adds another layer of complexity. Teams often route leads based on geography, product line, license type, or agent availability. Without a flexible system to manage those rules, things slip through the cracks.

### Here are some common signs that your workflows need attention:

- ⚠ Leads regularly go unanswered or bounce between teams
- ⚠ Agents follow up late or without context
- ⚠ Duplicate records or mismatched data slow down sales and service
- ⚠ You lack visibility into where and why leads stall

These problems don't just affect efficiency. They damage the policyholder experience and make it harder to grow. **By identifying where these breakdowns occur, you can start fixing the parts that slow you down.**

# The Hidden Cost of Manual Handoffs

Every time a lead or inquiry changes hands, your process slows down.

If that handoff relies on someone manually checking an inbox, reassigning a task, or copying information from one system to another, you're not just losing time, you're inviting mistakes.



## Ownership Confusion

Manual routing creates confusion about ownership. When multiple people touch the same lead without a clear system in place, no one knows who's responsible. As a result, leads sit in limbo, waiting for someone to take action.



## Human Error from Data Entry

Repeated data entry leads to avoidable errors. Typing in a name wrong, assigning a lead to the wrong region, or failing to update a status might seem small, but these mistakes add up quickly. One missed detail can delay a quote, confuse a policyholder, or create duplicate records that muddy your CRM.



## Poor Reporting and Visibility

If lead status updates don't happen in real time, reports are inaccurate. That makes it harder to forecast, spot issues early, or give credit where it's due.



## Disrupted Customer Experience

Inconsistent handoffs also affect how you serve policyholders. When agents don't have full context or receive leads too late, it's harder to build trust or deliver a smooth experience.

Manual processes might seem manageable when volume is low. But as your business grows, the gaps widen.

The cost isn't just time. It's missed opportunities, confused customers, and a growing disconnect between the front lines and the systems meant to support them.

# Why Dirty Data Makes Everything Harder

You can build the best routing rules, hire top agents, and run strong campaigns, but if your data is a mess, none of it works like it should.

## Duplicate Records Create Confusion

Duplicate records cause quoting and servicing issues. A single lead might enter the system twice with slightly different details. As a result, teams may reach out multiple times, send conflicting information, or fail to recognize that the lead already has an open case. These missteps confuse policyholders and erode trust.

## Orphaned Leads Disrupt Follow-Up

Orphaned leads break the chain of context. When a lead lacks a clear connection to an account, region, or agent, it becomes unclear who should follow up or what the lead is interested in. That slows everything down and increases the chance of a missed opportunity.

## Fragmented Data Weakens Reporting

Disconnected or incomplete data weakens your ability to measure what works. If marketing cannot track which leads turn into policyholders, it becomes harder to evaluate campaign performance or build reliable customer segments. Inaccurate or missing data limits your ability to personalize outreach or identify patterns worth repeating.



## SLA Tracking Becomes Unreliable

Then, there's the challenge of accountability. Without clean ownership data, SLA enforcement falls apart. If no one knows who owns a lead or how long it has gone untouched, you lose visibility and control.

### Why It Matters

A clean, connected CRM is the foundation that supports accurate routing, responsive service, and smart decision-making. Without that foundation, even the best strategies fall apart.

# Connect Inquiries to the Right Person, Right Away

Modernizing insurance operations doesn't always require a massive transformation. Sometimes, it starts with something as simple and powerful as connecting each inquiry to the right person from the beginning. **This process is often referred to as “matching” in CRM systems.**

So one way to fix delayed follow-ups, manual handoffs, and disconnected data is by improving your matching processes.

First, when you route based on customizable fields like region, product, license type, or existing relationships, inquiries reach someone who can act quickly. That **keeps the quoting process moving and prevents unnecessary delays.**

Next, when agents receive full context, whether the person is a new prospect, a returning applicant, or an existing policyholder, they can respond in a **more informed and personalized way.**

By improving how you connect people to the right resource, you solve multiple operational issues at once. It's a simple step that supports **faster response times and a better experience** across the board.

## “Incredible system”



### What do you like best about LeanData?

The improvement that LeanData provided to us as an organization via its matching logic in terms of both the list match analyzer, and the overall routing is just incredible. It helped us clean up our data to ensure contacts matched the correct accounts all the while lessening our overall lead handling turn around time. No leads are getting left on the table and our database is cleaner.

- Verified User in Computer Software

**Saviynt** experienced a 53% increase in lead-to-account matches with LeanData compared to their previous matching solution.

**Saviynt**

# Automating for GTM Agility at Scale

You can't modernize your operations if every change to your routing process requires a ticket, a workaround, or a complete rebuild.

Legacy systems and hardcoded workflows might have worked when your team was smaller or more centralized. But as your business grows, so do the exceptions, handoffs, and edge cases.

First, you expand into new regions.





Then, you add more products.

Next, you restructure teams or bring on a new business unit after an acquisition.

Suddenly, your workflows are out of sync with how your business actually runs.

To keep up, insurance organizations need flexibility. Automating specific tasks like assigning inquiries, updating routing rules, or rerouting requests based on agent availability makes it easier to adapt without rebuilding from scratch.

Here are a few scenarios where automation helps teams move faster:

-  Reassigning inquiries after a team restructure or acquisition
-  Routing based on updated licensing, regional changes, or new product lines
-  Adjusting assignment rules during open enrollment or seasonal spikes
-  Managing temporary handoffs when agents are out of the office

Plus, when operations teams can adjust workflows without relying on IT, they solve problems faster and reduce downtime.

As a result, inquiries reach the right people quickly. Agents respond faster. Policyholders get the experience they expect.

Flexible automation supports the kind of agility modern insurance operations require. It not only saves time, but also makes your entire GTM process easier to scale.

# Supporting the Entire Policyholder Lifecycle

Modernizing operations means looking beyond new business. Many insurance teams focus on capturing new inquiries, but the real test of efficiency and service comes after the first policy is sold.

## Renewals & Upsells Need Fast Follow-Up

If a policyholder asks about adding coverage or updating their plan, they expect a fast, informed response. Without the right workflows in place, that request can sit too long or end up in the wrong queue.

## Service & Claims Touch Multiple Teams

A question might start with an agent, move to a service rep, and end with underwriting. Without clear routing logic and full visibility into each step, response times slow down and customer frustration increases.

## Customers Expect Seamless Communication

Policyholders reach out through a mix of channels: web forms, call centers, mobile apps, and broker networks. As a result, your internal systems need to support seamless transitions across those touchpoints. That only works when the right process automation is in place behind the scenes.



With GTM automation supporting your routing and assignment rules, you can:









- Ensure inquiries land with the right person, every time
- Respond faster across sales, service, and claims
- Create visibility across digital and human touchpoints
- Reduce manual handoffs and eliminate dropped requests

When you support the full lifecycle, not just the first sale, you improve retention, strengthen customer trust, and deliver the kind of experience that sets you apart.

# Your Insurance GTM Health Check

Not sure if your go-to-market workflows are helping or holding you back? Use this quick checklist to assess the health of your insurance operations. If you check off several of these, it may be time to modernize your systems and processes.

## Check for These Common Red Flags:

-  Inquiries often go unanswered or take too long to reach the right person
-  Agents follow up without knowing the full history or policyholder context
-  You rely on spreadsheets or email to manage lead distribution
-  You see duplicate or mismatched records in your CRM
-  Reporting feels incomplete or inaccurate
-  It's hard to adapt your processes when your team structure changes
-  Marketing and sales don't have a shared view of the customer
-  You lose track of where service requests or renewals stand

## Ask Yourself These Questions:

- ☐ Do we know exactly how inquiries get assigned across teams?
- ☐ Can we track how long it takes to respond to a quote request?
- ☐ How confident are we in the accuracy of our CRM data?
- ☐ Can we make workflow changes quickly without needing IT support?
- ☐ Do our digital and agent-led experiences feel connected to the customer?

## Tactical Next Steps:

- Identify the most common breakdown in your inquiry-to-policyholder journey
- Clean up and standardize your data sources and field mapping
- Review your current rules for inquiry assignment and follow-up
- Document handoffs between teams and remove manual steps where possible
- Look for areas where automation could save time and improve consistency

A few small changes can have a big impact on how you respond, how you scale, and how you serve every policyholder.

# How LeanData Supports Insurance Operations

Most operations teams know the friction that comes from slow handoffs, unclear ownership, and outdated system logic. What should be a simple process, like connecting an inquiry to the right person, often breaks down when the backend infrastructure can't keep up.



## Automated Routing That Mirrors Your Business Logic

LeanData helps insurance teams automate CRM routing by assigning inquiries, prospects, or policyholders based on region, product type, license status, or any custom criteria, ensuring consistent handoffs without relying on manual steps or hardcoded rules.



## No-Code Workflow Control With FlowBuilder

LeanData's drag-and-drop FlowBuilder gives operations teams full control over their routing logic. You can design, test, and update workflows without writing code or waiting on IT. This flexibility is especially valuable when team structures shift, new products launch, or your organization grows through acquisition.



## Cleaner Data and More Reliable CRM Performance

Next, LeanData helps maintain data integrity. It prevents duplicate records, links related contacts and accounts, and ensures that every inquiry is connected to the right entity. Teams get the full context they need, while reports and dashboards stay clean and accurate.



## Visibility and Accountability at Every Stage

LeanData also tracks routing outcomes, SLA adherence, and follow-up activity. This gives Operations leaders real-time insight into where gaps exist and how performance can improve.

From initial inquiry through renewal and claims, LeanData supports the full policyholder journey. By automating assignment and simplifying workflow management, it helps modern insurance operations move faster, stay accurate, and scale with confidence.

# What Makes LeanData Different?

LeanData is a **purpose-built GTM orchestration** platform designed for speed, precision, and scalability.

## Built for Orchestration

LeanData goes beyond simple lead routing to provide end-to-end orchestration. Key capabilities include:



### Lead-to-Account Matching

Connects leads with existing accounts automatically.



### Reliable Routing

Moves leads, contacts, accounts, and opportunities through workflows with precision.



### Buying Group Engagement

Uncovers buying signals from buying committee members to move deals forward faster.

## No-Code Simplicity, Enterprise-Grade Power

Unlike Salesforce Flows, which require Apex coding and admin expertise, LeanData offers:



### Visual, Drag & Drop interface

Easily build and adjust routing rules.



### Instant Updates

Make changes quickly without adding to IT backlog.



### Scalability Without Roadblocks

Adapts to evolving GTM motions effortlessly.

## Smarter Matching & Routing at Scale

LeanData's advanced logic **goes beyond standard automation** to support:



### Multi-tiered assignment rules

Route leads, contacts, accounts and opportunities based on territories, round-robin distribution, or SLAs.



### Fallback Logic

Prevents stalled deals with automatic rerouting.



### Seamless Integrations

100% Salesforce-native; connects with marketing automation and sales engagement tools.

## Proven & Trusted

LeanData is **trusted by thousands of companies** across industries.



60% increase in pipeline



25% increase in opportunity creation



Changes that took weeks with a contractor are now done in-house in just hours



Lead response time reduced from 90 minutes to 10 minutes



133% increase in pipeline



55 hrs/week saved in manually managing routing rules



Saved 4+ hrs per week and eliminated 200 workflow rules



167% increase in accounts reached each week



2x conversion rates



Changes that used to take months now takes one week or less



78% reduction in SDR time spent researching inbound leads



3.5 minutes from lead creation to Outreach sequence (400% decrease)

# About LeanData

## From DIY to Purpose-Built

Choosing the Right GTM Execution Solution

EBOOK



**From DIY to Purpose-Built:  
Choosing the Right GTM Execution  
Solution**



VIDEO

**LeanData Demo in 100 Seconds**



Watch Video

CUSTOMER STORY

**HILLARY LAMB**  
Senior Salesforce Business Analyst

**Hillary's Story: Why LeanData Is a  
de Facto Standard**

## Get Started Today

Visit **LeanData.com** to learn more about LeanData's intelligent GTM orchestration solutions for Automated Scheduling, Matching, Routing, Buying Groups, and Engagement, or visit us on the Salesforce AppExchange.

**Request Demo**

## Why LeanData?

Today's growth leaders power their B2B selling with LeanData, the gold standard in go-to-market orchestration and an essential element of the modern RevTech stack. The LeanData Orchestration Platform, powered by No-Code Automation, simplifies and accelerates coordination of all the people, processes and plays needed to transform buyer signals into buying decisions. LeanData is inspiring a global movement among its 1,000+ customers and community of 5,000+ OpsStars worldwide, empowering them with operations excellence that translates into compelling buyer experiences and competitive advantage.