

LeanData

MODERNIZING INSURANCE OPERATIONS

ROUTE EVERY INQUIRY TO THE RIGHT LICENSED AGENT, INSTANTLY



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At the same time, they're juggling outdated systems, complex team structures, and pressure to keep up with faster, more agile competitors.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

- ✓ Route every inquiry to the right licensed agent by product line, region, license type, and availability
- ✓ Accelerate speed-to-quote with instant responses and prioritization of high-value submissions
- ✓ Eliminate duplicate records and link new submissions to existing policies
- ✓ Adapt routing rules when your team restructures, adds products, or expands, without filing IT tickets
- ✓ Support the full policyholder journey, from first inquiry through renewal and claims

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

>30%

of insurance customers are unsatisfied with their carrier's digital channels

(McKinsey)

391%

increase in conversion when responding to an insurance lead within 1 minute

(Velocify)

82%

of employers would drop their broker over slow response time

(Zywave)



TABLE OF CONTENTS

EXECUTIVE SUMMARY **4**

Where Insurance Workflows Break Down 5

The Hidden Cost of Manual Handoffs 6

Why Dirty Data Makes Everything Harder 7

Connect Inquiries to the Right Person, Right Away 8

Automating for GTM Agility at Scale 9

Supporting the Entire Policyholder Lifecycle 10

Your Insurance GTM Health Check 11

How LeanData Supports Insurance Operations 12

What Makes LeanData Different? 13

RECOMMENDED RESOURCES **15**



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.

Inquiries arrive from web forms, broker referrals, agency partners, digital quote tools, and AI chat channels. Without clear routing rules, they stall in handoff queues, reach the wrong agent, or surface as duplicates that fragment the applicant record. When this happens repeatedly, it costs you policies and erodes trust with the brokers and policyholders you're trying to serve.

INQUIRIES DON'T REACH THE RIGHT LICENSED AGENT FAST ENOUGH

Without routing logic tied to license type, product line, territory, and agent availability, that inquiry sits untouched or lands with someone who can't act on it. Every minute of delay is a minute your competitor can use.

TEAMS LOSE VISIBILITY AFTER THE HANDOFF

Disconnected systems make it hard to track what happens after an inquiry changes hands. Sales may not know if a quote was sent. Marketing may not know if the lead became a policyholder. Teams work from incomplete data, duplicate efforts, and miss follow-ups that should have been automatic.

COMPLEX DISTRIBUTION STRUCTURES CREATE MORE FRICTION

Most insurance organizations route inquiries across geographies, product lines, license types, broker networks, and agent availability. Managing those rules manually, through spreadsheets or IT-dependent workflows, means things slip through the cracks every time your business changes.

HERE ARE SOME COMMON SIGNS THAT YOUR WORKFLOWS NEED ATTENTION:

- » Inquiries go unanswered or bounce between teams
- » Agents follow up late or without the full submission context
- » Duplicate or mismatched records slow down quoting and servicing
- » You lack visibility into where and why inquiries stall
- » Workflow changes require an IT ticket

These problems not only hurt efficiency, but also damage the policyholder experience and make it harder to scale into new product lines, geographies, or acquisitions. **Identifying where the breakdowns occur is the first step to fixing them.**



THE HIDDEN COST OF MANUAL HANDOFFS

Every time an 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.

01 OWNERSHIP CONFUSION

Manual routing creates confusion about ownership. When multiple people touch the same inquiry without a clear system in place, no one knows who's responsible. Submissions sit in limbo, waiting for someone to take action, while high-intent buyers move on to a competitor who responded first.

02 HUMAN ERROR FROM DATA ENTRY

Repeated data entry leads to avoidable errors. Assigning an inquiry to the wrong region, misspelling a policyholder's name, or failing to update a status might seem minor, but these mistakes compound fast. One missed detail can delay a quote, trigger a duplicate record, or send a broker referral to an agent without the right license.

03 POOR REPORTING AND VISIBILITY

When lead status updates don't happen in real time, reports are inaccurate. That makes it harder to enforce SLAs, spot where inquiries stall, or hold teams accountable for response time commitments.

04 DISRUPTED POLICYHOLDER EXPERIENCE

Inconsistent handoffs change how policyholders experience your brand. When agents receive inquiries without full submission context, or receive them too late, the resulting interaction feels disjointed. That erodes the trust you need to win and retain business.

Manual processes might seem manageable when volume is low. But as your distribution operations grow, the gaps widen.

The cost isn't just time. It's missed policies, broker relationships at risk, and a growing disconnect between your front-line agents 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 problems specific to insurance. A single applicant might enter the system twice with slightly different details from two different channels: a web form and a broker referral, for example. Teams reach out multiple times, send conflicting information, or fail to recognize an open case. These missteps confuse policyholders and damage the broker relationship that drives referral volume.



ORPHANED LEADS DISRUPT FOLLOW-UP

When an inquiry lacks a clear connection to an account, region, or licensed agent, it becomes unclear who should follow up or what the prospect actually needs. That breaks the chain of context agents depend on to respond quickly and accurately, and increases the chance of a missed policy.

FRAGMENTED DATA WEAKENS REPORTING

Disconnected or incomplete data makes it harder to measure what works. If marketing can't track which inquiries convert to policyholders, campaign performance becomes impossible to evaluate. Inaccurate data also limits your ability to identify cross-sell and upsell patterns across your existing book of business.

SLA TRACKING BECOMES UNRELIABLE

Without clean ownership data, SLA enforcement breaks down entirely. No one knows who owns an inquiry or how long it has gone untouched. For insurance carriers with compliance obligations and response time commitments to brokers and regulators, it's both an operations problem and a risk.

WHY IT ALL MATTERS

A clean, connected CRM is the foundation that supports accurate routing, responsive service, and compliant operations. Without it, even the best distribution strategy falls 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 licensed agent from the beginning.

In CRM systems, this is called matching.

Matching fixes delayed follow-ups, manual handoffs, and disconnected data in one step. When routing logic accounts for license type, state, product line, territory, and agent availability, inquiries reach someone who can act immediately. That keeps the quoting process moving and protects your response time commitments to brokers and policyholders.

When agents receive full submission context, whether the person is a new applicant, a returning policyholder, or a broker referral tied to an existing account, they respond faster and with more accuracy. That context is the difference between a generic follow-up and a conversation that builds trust.

Good matching also prevents the data problems that slow everything else down. When inquiries are automatically linked to the right account, policy record, and agent, duplicate records don't form, orphaned leads don't accumulate, and your CRM stays clean enough to report on with confidence.

Improving how you connect inquiries to the right resource solves routing, data quality, and policyholder experience problems at once. It's the operational foundation everything else depends on.

"LEANDATA STREAMLINES LEAD ROUTING WITH INTUITIVE, FLEXIBLE AUTOMATION"

★★★★★ 5/5

What do you like best about LeanData?

LeanData helps streamline the routing and matching of leads, which makes our sales process more efficient. I appreciate how the platform improves data accuracy and cuts down on manual work through automation. The interface feels intuitive, and the routing logic is flexible enough to support our workflow without getting in the way. Overall, it's been a valuable tool for strengthening our sales operations.



Verche N.

Marketing Operations Analyst
Computer Software
Mid-Market (51-1000 emp.)

[READ THE REVIEW](#)

 **Saviynt**

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



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 insurance distribution doesn't stay static. You expand into new states.

You add commercial lines or group benefits products. You restructure teams or absorb a new business unit after an acquisition. You onboard a new broker network. Suddenly your workflows are out of sync with how your distribution operation actually runs.

To keep up, insurance organizations need routing logic they can change themselves. Automating inquiry assignment, updating routing rules, or rerouting requests based on agent availability or license status makes it possible to adapt without rebuilding from scratch or waiting on IT.

HERE ARE A FEW SCENARIOS WHERE AUTOMATION HELPS DISTRIBUTION TEAMS MOVE FASTER:

- » Reassigning inquiries after a team restructure or acquisition
- » Routing based on updated licensing, new product lines, or regional expansion
- » Managing broker network handoffs and third-party referral sources
- » Adjusting assignment rules during open enrollment or seasonal volume spikes
- » Rerouting automatically when agents are unavailable or over capacity



When operations teams control their own workflows, they solve problems faster, protect SLA commitments, and keep agents focused on selling rather than chasing down misrouted submissions.

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

Flexible automation is an efficiency play, but it's also what allows modern insurance distribution operations to scale without adding headcount or accumulating technical debt.



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 operational efficiency and service comes after the first policy is sold.

RENEWALS & UPSELLS NEED FAST FOLLOW-UP

When a policyholder asks about adding coverage, updating a plan or expanding into a new product line, they expect a fast, informed response. Without automated workflows connecting that request to the right agent, it sits in the wrong queue while the window to retain or expand the relationship closes.

SERVICE & CLAIMS TOUCH MULTIPLE TEAMS

A service question might start with an agent, move to a service rep, and end with underwriting. Commercial lines and group benefits add even more stakeholders to that chain. Without clear routing logic and full audit trail visibility into each step, response times slow, compliance risk grows, and policyholder frustration compounds.

BUYING COMMITTEES REQUIRE COORDINATED ENGAGEMENT

Commercial insurance deals rarely involve a single decision-maker. Risk managers, CFOs, benefits leaders, and procurement all have a role. Orchestrating engagement across that buying group, with the right message reaching the right stakeholder at the right time, is what separates carriers that win complex accounts from those that lose them to a faster competitor.

WITH GTM AUTOMATION SUPPORTING YOUR ROUTING AND ASSIGNMENT RULES, YOU CAN:

- » Trigger automatic follow-up on renewals, upsells, and cross-sell opportunities
- » Route service and claims requests across teams without manual intervention
- » Maintain full audit trails across every human and system-driven action
- » Coordinate engagement across commercial buying groups and broker networks

When you support the full lifecycle, not just the first sale, you improve retention, protect broker relationships, and build the kind of operational foundation that scales.



YOUR INSURANCE GTM HEALTH CHECK

Not sure if your go-to-market workflows are helping or holding you back? Use this checklist to assess the health of your insurance distribution operations. If several of these look familiar, it may be time to modernize.

CHECK FOR THESE COMMON RED FLAGS:

- Inquiries stall in handoff queues or reach the wrong agent
- Agents follow up without full submission context or policyholder history
- Spreadsheets or email still control lead and inquiry distribution
- Duplicate or mismatched records create quoting and servicing problems
- You have no visibility into response times or where inquiries stall
- Workflow changes require IT support or hardcoded rule adjustments
- Broker referrals and third-party submissions aren't routing reliably
- Renewal and upsell requests sit in the wrong queue or go unworked

ASK YOURSELF THESE QUESTIONS:

- Do we route inquiries based on license type, state, product line, and agent availability?
- Can we track speed-to-quote and enforce SLA commitments across teams?
- How confident are we in our CRM data accuracy for compliance and reporting?
- Can operations update routing rules without filing an IT ticket?
- Are inquiries from AI-driven channels routing with the same reliability as inbound forms?

TACTICAL NEXT STEPS:

- » Identify the most common breakdown in your inquiry-to-policyholder journey
- » Audit your routing rules for license type, state, and product line coverage
- » Clean up duplicate records and standardize field mapping across systems
- » Document handoffs across sales, service, renewals, and claims, and remove manual steps
- » Evaluate whether your current workflows can handle broker networks, acquisitions, and seasonal volume spikes

A few targeted changes to your routing and assignment logic can have a big impact on speed-to-quote, broker satisfaction, and policyholder retention.



HOW LEANDATA SUPPORTS INSURANCE OPERATIONS

Most operations teams know the friction that comes from slow handoffs, unclear ownership, and routing logic that breaks every time the business changes. What should be a straightforward process, connecting an inquiry to the right licensed agent, falls apart when the backend infrastructure can't keep up.

LeanData is the leading platform for AI GTM Orchestration, sitting at the intersection of AI agents, human sellers, and the systems they share. For insurance distribution teams, that means every signal, whether it comes from a web form, a broker referral, an AI chat tool, or a digital quote channel, is routed, actioned, and governed with the same rigor.

AUTOMATED ROUTING THAT MIRRORS YOUR DISTRIBUTION LOGIC

LeanData automates inquiry assignment based on license type, state, product line, territory, agent availability, or any custom criteria. Routing rules update instantly when your team restructures, adds products, or expands into new markets, without writing code or filing IT tickets.

NO-CODE WORKFLOW CONTROL WITH FLOWBUILDER

LeanData's drag-and-drop FlowBuilder gives operations teams full control over their routing logic. Design, test, and update workflows without waiting on IT. That flexibility is especially valuable during open enrollment spikes, broker network expansions, and post-acquisition restructures.

CLEANER DATA AND MORE RELIABLE CRM PERFORMANCE

LeanData prevents duplicate records, links submissions to existing policies and accounts, and ensures every inquiry connects to the right entity. Agents get the full context they need. Reports and dashboards stay accurate enough for compliance and attribution.

TRANSPARENCY AND GOVERNANCE AT EVERY STAGE

LeanData also tracks routing outcomes, SLA adherence, and follow-up activity across every human, system, and AI-driven action, with full audit trails. For compliance-conscious insurance carriers, that's not a nice-to-have. It's the foundation of a GTM operation you can govern and defend.

From first inquiry through renewal and claims, LeanData supports the full policyholder journey, helping modern insurance distribution teams move faster, stay accurate, and scale with confidence.



WHAT MAKES LEANDATA DIFFERENT?

LeanData is the **leading platform for AI GTM Orchestration**, sitting at the intersection of AI agents, human sellers, and the systems they share.



BUILT FOR ORCHESTRATION

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

- ✓ **LEAD-TO-ACCOUNT MATCHING**
Connects leads with existing accounts automatically, with AI-powered matching logic that explains every decision.
- ✓ **RELIABLE ROUTING**
Moves leads, contacts, accounts, and opportunities through workflows with precision.
- ✓ **BUYING GROUP ENGAGEMENT**
Uncovers buying signals from buying committee members using AI to identify stakeholders, normalize titles, and 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, including AI-driven signals and agentic workflows, without rebuilding from scratch.

WHAT MAKES LEANDATA DIFFERENT? (CONT.)



SMARTER MATCHING & ROUTING AT SCALE

LeanData's advanced logic goes beyond standard automation, including:



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 with complex distribution models, including financial services, insurance, and enterprise software.



60% increase in pipeline



133% increase in pipeline



2x conversion rates



25% increase in opportunity creation



55 hrs/week saved in manually managing routing rules



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



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



Saved 4+ hrs per week and eliminated 200 workflow rules



78% reduction in SDR time spent researching inbound leads



Lead response time reduced from 90 minutes to 10 minutes



167% increase in accounts reached each week



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

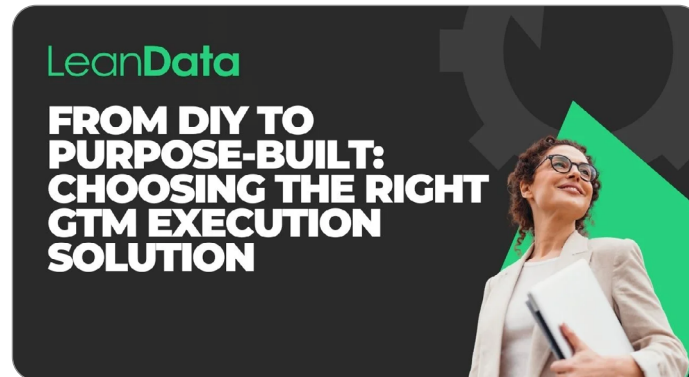


RECOMMENDED RESOURCES



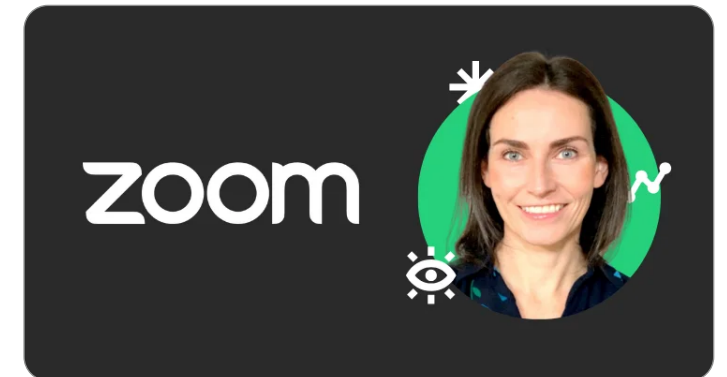
RESEARCH STUDY

[Harvard Business Review: Aligning Go-to-Market Execution with Strategy](#)



EBOOK

[From DIY to Purpose-Built: Choosing the Right GTM Execution Solution](#)



CUSTOMER STORY

[How Zoom Used Intelligent GTM Orchestration to Break Down Operational Silos & Increase Revenue](#)

GET STARTED TODAY

Visit [LeanData.com](https://leandata.com) to learn more about LeanData's Intelligent GTM Orchestration solutions for automated Scheduling, Matching, Routing, and Buying Groups, or visit us on the Salesforce [AppExchange](#).

[REQUEST A DEMO](#)

Why LeanData?

LeanData helps B2B enterprises fuel efficient growth by aligning marketing, sales, and customer service execution with the buyer journey. Our Intelligent GTM Orchestration platform acts as the connective tissue across the revenue lifecycle, integrating and normalizing buyer data, automating signal-driven workflows, and delivering AI-powered insights. The result is faster, cleaner execution and the ability to adapt GTM motions with agility without coding. More than 1,000 leading companies and a community of 5,000+ OpsStars rely on LeanData to achieve speed to lead, higher conversions, accelerated pipeline, and predictable growth by turning buyer signals into coordinated action.

