

# LEANDATA FOR INSURANCE CARRIERS

Automated Routing, Assignment, and Workflow Orchestration for Insurance Distribution Teams

## The Challenge

Insurance organizations are under pressure to modernize distribution operations while managing legacy policy systems, complex account hierarchies, and strict compliance requirements. Inquiries arrive from web forms, broker referrals, agency partners, digital quote tools, and AI chat channels – yet they routinely stall in handoff queues, reach the wrong agent, or surface as duplicates that fragment the applicant record. Manual reassignment, spreadsheet-based lead lists, and IT-dependent workflow changes slow speed-to-quote, lower conversion rates, and make it nearly impossible to scale into new product lines, geographies, or acquisitions effectively.

## The Solution

LeanData automates the routing, assignment, and workflow orchestration that insurance distribution teams rely on to move fast and stay compliant. Seamlessly integrated with Salesforce and Microsoft Dynamics, LeanData connects every inbound inquiry, from quote requests and broker referrals to renewal triggers and AI-generated leads, to the right licensed agent instantly, with full audit trails and zero manual intervention. Insurance carriers use LeanData to instantly match and route inquiries to the right licensed agent, accelerate speed-to-quote, coordinate complex commercial buying groups, and maintain a clean, compliant CRM foundation – all without writing code or filing IT tickets.

## Route Every Inquiry to the Right Licensed Agent

- Match inquiries by product line, region, license type, and agent availability – with no manual reassignment.
- Auto-reroute submissions when primary agents are out of office or over capacity to protect SLA attainment and response time commitments.
- Handoff inbound leads from AI chat tools, digital channels, and third-party referral sources to the right licensed agent or broker, with full submission context.

**391%**

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

Source: Velocify

**>30%**

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

Source: McKinsey

**82%**

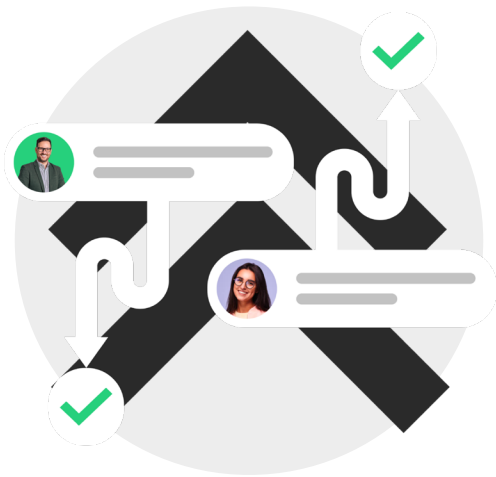
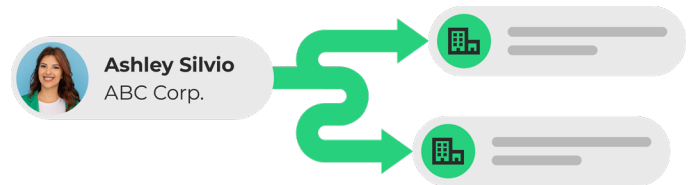
of employers would drop their broker over slow response time

Source: Zywave



## Accelerate Speed-to-Quote and First Response

- Trigger instant quote responses and consultation bookings to capture high-intent buyers before they go to a competitor.
- Prioritize high-value submissions automatically based on premium potential, account fit, and risk profile.
- Eliminate manual handoffs across new business, service, and renewals to compress cycle times and increase agent productivity.



## Coordinate Complex Commercial Accounts and Broker Networks

- Map every stakeholder (e.g., risk managers, CFOs, benefits leaders, procurement) to the right buying group persona.
- Scale across complex enterprise account hierarchies, broker networks, and multi-policy commercial relationships.
- Auto-dedupe applicants and account records, link new submissions to existing policies, and maintain full audit trails across every AI-driven and human action.

# GET STARTED TODAY

See how LeanData helps insurance carriers route faster, respond smarter, and scale distribution operations without adding headcount or filing IT tickets, or visit us on [Salesforce AppExchange](#).

REQUEST A DEMO

## Why LeanData?

LeanData is the leading platform for AI GTM Orchestration, sitting at the intersection of AI agents, human sellers, and the systems they share. As the connective tissue across the entire revenue lifecycle, LeanData ensures every signal, whether AI-generated, system-triggered, or human-driven, is routed, actioned, and governed with the same rigor. 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 translate GTM strategy into coordinated execution across customer acquisition, adoption, account retention and expansion.