

How One MGA Boosted Bind Rates with Smart Follow-Up from Expert Insured

Real-world results from turning forgotten quotes into bound business using built-in CRM and automation

The Problem

This MGA was quoting consistently but struggled to convert those quotes into bound policies. Without a centralized system to track outreach, follow-ups were missed and brokers were left waiting. Submissions from previous years were often forgotten, and there was no structured way to identify which brokers or deals to prioritize. The team was putting in the work, but too many opportunities were slipping through the cracks.

The Solution

To improve close rates and regain control of their pipeline, the MGA implemented Expert Insured's CRM and workflow automation tools.

- ✓ All quotes and submissions were automatically tracked and associated with broker records
- ✓ The CRM highlighted prior-year submissions and renewal opportunities, prompting timely outreach
- ✓ Bulk communication tools enabled the team to follow up on outstanding quotes without manual effort
- ✓ Task management and dashboards gave clear visibility into next steps across the sales cycle
- ✓ Sales and underwriting worked in sync, with shared visibility into progress and priorities

The Impact

- ✓ Higher quote-to-bind conversion through consistent follow-up
- ✓ Prior year leads re-engaged and converted into new business
- ✓ Follow-up communication handled efficiently at scale
- ✓ Brokers experienced more proactive, professional engagement
- ✓ The team operated with more focus and fewer dropped opportunities

Looking to Improve Your Hit Ratio?

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