

## How One MGA Unified Its Entire Operation with Expert Insured

*From CRM to quoting to task management - all in one integrated system*

### The Problem

This growing MGA was using five different tools to manage its day-to-day business — one for CRM, another for document storage, a separate workflow tracker, and spreadsheets for quoting and tasking. The result: constant context switching, data silos, missed follow-ups, and frustrated teams.

### The Solution

By moving to Expert Insured, the MGA brought everything under one roof.

- ✓ Centralized CRM with contact and broker visibility across accounts
- ✓ Document management directly tied to policies and submissions
- ✓ Task assignments, follow-ups, and approval workflows built into the same system
- ✓ Real-time dashboards and audit trails to manage every piece of work from intake to bind

### The Impact

- ✓ Entire operation now runs on a single platform
- ✓ No more lost documents, missed tasks, or data reentry
- ✓ Clear visibility into what's done, what's pending, and who's responsible
- ✓ Happier staff, faster onboarding, and fewer tech headaches



We used to spend so much time just figuring out where things were. Now, everything we need is in one place — **Director of Operations, MGA**

### Tired of Working Across 5 Systems?

Expert Insured is ready to replace your disconnected systems.

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