Speak it once. ClientPulse updates the client record.

After a meeting, speak naturally while the details are fresh. ClientPulse parses the conversation into the right fields, reduces typing and missed information, sets the next appointment and sends the reminder.

Voice-driven after every meeting

- Dictate immediately while details are fresh
- Speak naturally — no rigid commands or forms
- ClientPulse parses details into the right fields
- Save typing and reduce missed information

From conversation to action

- Update the client and household record
- Capture policies, needs, notes and commitments
- Set the next appointment as you speak
- Send the configured appointment reminder

Renewal & X-date autopilot

- Choose a 30–365 day look-ahead window
- Create assigned re-shop and coverage-review tasks
- Surface cross-sell opportunities before renewal
- Default X-date 45 days before expiration

Pipeline & producer execution

- New Lead → Quoting → Quote Delivered
- Underwriting → Bound → Lost
- Separate pipelines by line of business
- Ownership, expected effective date and premium value

One complete client record

- Household, spouse and business details
- Policies, CDs, annuities and investments
- Calls, emails, meetings, notes and tasks
- A shared timeline showing what comes next

Use voice your way

- Free-form natural speech after a meeting
- Guided field-by-field voice entry
- Phone-friendly Quick Intake anywhere
- Typing and CSV import remain available

Less typing. More complete records. Capture the meeting while it is still fresh, then review the parsed details before they become part of the client record.

Finish the meeting. Speak the update. Keep moving.

Voice-driven follow-up turns a natural recap into an accurate, actionable record without waiting to return to a keyboard.

1. **Conclude the meeting**
   Open Quick Intake from your phone or computer while the conversation is still fresh.
2. **Speak naturally**
   Recap the client, household, policies, needs, notes, commitments and next steps in your own words.
3. **Let ClientPulse organize it**
   The system parses your speech into the appropriate record fields, helping reduce typing errors and omissions.
4. **Continue the relationship**
   Set the next appointment as you speak; ClientPulse saves it and sends the configured appointment reminder.

Built for five lines of business

Personal Lines	Commercial Lines	Benefits & Medicare	Life & Long-Term Care	Annuities
Households, auto, home, umbrella	BOP, GL, workers' comp, fleet	AEP/OEP and group renewal work	Protection reviews and underwriting	Maturities and income reviews

Introductory plans

Plan	Monthly	Users
Independent Agent	$49/mo	1 user
Agency Starter	$299/mo	Up to 9 users
Agency Growth	$699/mo	10–20 users
Agency Growth 21+	$799/mo	21+ users

Start with 14 days free — no credit card required.
Explore the platform, pricing and 3-minute tour at clientpulse.ltd/insurance.