ClientPulse

for Insurance Agencies

Complete Capability Guide

Every major capability in the ClientPulse insurance agency system:
what it does, where to find it, and how it supports the book.

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clientpulse.ltd/insurance

Guide map

Use this guide as a setup checklist, a day-to-day reference, or a tour of what the insurance workspace can do.

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Three principles behind the workspace

- The client relationship is the center; policies, opportunities and communication stay connected to it.
- Dates become visible work; X-dates, expirations, maturities and appointments drive tasks and reminders.
- People remain in control; prepared outreach requires review and confirmation before a campaign starts.

01 Get started

Configure the agency once, then choose the fastest way to bring in the book and keep it current.

Agency setup

- Set the agency name, primary contact, phone, business email and sending signature.
- Connect Google Calendar for two-way calendar visibility and appointment reminders.
- Connect the agency video room for client reviews and one-touch meeting invitations.

Add or update clients three ways

- Guided voice: move field by field while ClientPulse listens and confirms.
- Natural-language intake: speak freely and let the assistant map details into fields.
- Typing: use the complete form for precise entry or correction.
- Phone-friendly Quick Intake supports adding or updating clients away from the desk.

Import the book

- Upload a CSV and map columns before committing the import.
- Recognized details include name, email, phone, company, title, website, LinkedIn, priority and notes.
- “Last, First” names are split correctly and duplicate handling protects existing records.
- During an active trial, the client limit does not block the import.

Recommended first-day checklist

- Complete Agency Setup and the sending signature.
- Add producers and assign their lines of business.
- Connect calendar and video meetings.
- Import a small sample, verify it, then import the remaining book.

02 Clients & household records

The client record is the shared source of truth for every producer and service team member.

Household and business identity

- Store contact details, spouse and household relationships, company, title, website and LinkedIn.
- Capture employment, banking and planning notes where relevant to the relationship.
- Use priorities and two separate note fields for the information your agency needs at a glance.

One chronological timeline

- Calls, emails, text activity, meetings, notes and tasks appear together.
- Quotes, policies and related opportunities remain tied to the same client.
- Any authorized team member can understand what happened and what comes next.

Appointments in the record

- The next appointment is visible directly on the client record.
- Add or edit the appointment without leaving the relationship view.
- Upcoming work also appears in task and calendar views.

Lists and selection

- Create lists such as Agency Owners, renewal cohorts or a line-of-business segment.
- Select all, clear a selection, or Shift-select a continuous range without checking every row.
- Use lists to organize outreach while preserving each person’s underlying record.

Archive before delete

- Quick Actions defaults to Archive, preserving the record outside the active working list.
- Archived records remain available in the archive and can be restored.
- Permanent deletion is a separate deliberate choice; archive and deletion actions are retained in history.

03 Policies, assets & renewals

Keep the entire insurance and financial relationship visible, then turn the important dates into action.

Policy record book

- Track carrier, policy number, line of business, policy type and status.
- Store premium, payment mode, commission rate and owning producer.
- Capture effective, expiration, X-date and maturity dates.
- Annualized premium and expected commission roll up for book-level visibility.

Five supported books

- Personal Lines: auto, home, umbrella and related household coverage.
- Commercial Lines: business coverage and relationship stakeholders.
- Benefits & Medicare: plan and enrollment work.
- Life & Long-Term Care: protection needs, applications and reviews.
- Annuities: contract values, maturities and retirement-income reviews.

Connected financial holdings

- Record investments, CDs, annuities, banking information and related planning details alongside the household.
- Keep spouse and beneficiary context close to policy and review activity.

Renewals & X-date autopilot

- Choose a look-ahead window from 30 to 365 days.
- If no X-date is entered, ClientPulse calculates one 45 days before expiration.
- Run autopilot to create assigned re-shop, coverage-review and cross-sell tasks.
- Tasks remain connected to the client, policy and owner.

What producers see

- Upcoming renewal, expiration and maturity work.
- Carrier and policy context before the call.
- Cross-sell gaps across household and business relationships.

04 Pipeline, tasks & calendar

Turn prospecting, quoting and service promises into assigned, dated work.

Insurance opportunity pipeline

- Move opportunities through New Lead, Quoting, Quote Delivered, Underwriting, Bound and Lost.
- Track premium value, expected effective date, stage, owner and associated client.
- Use separate pipelines for different lines or programs when the plan supports them.

Tasks and activity

- Create calls, quote delivery, application follow-up, loss-run requests, renewal reviews and claim follow-ups.
- Attach work to a client, policy or opportunity, or keep it standalone.
- Use priority and due date to keep urgent renewal work visible.

Appointments and scheduling

- Share a booking link so clients choose from live availability.
- Sync meetings with Google Calendar.
- Send configured 24-hour and 30-minute appointment reminders.
- Open a client record to send the video-room link or start the meeting.

Quick Intake from a phone

- Open the authenticated Quick Intake page from a mobile device.
- Choose assistant, guided voice or typing.
- Update an existing client without waiting to return to the office.

Daily visibility

- Review due and overdue tasks for the agency owner and team.
- See upcoming appointments and the work attached to each client.

05 Communication & campaigns

Prepare consistent outreach, preserve review controls and keep the resulting history with the client.

Email and signature

- Send from the client record or a prepared sequence.
- Apply the stored agency signature to outbound email.
- Website, scheduling and other embedded URLs render as clickable links.
- Outbound activity is logged to the relationship record when sent through ClientPulse.

Text and reminders

- Choose text or email for eligible reminder workflows.
- Birthday and appointment reminders can include an email video or a video link in text.
- Consent and channel controls remain part of the send path.

Insurance campaign cadences

- Use editable templates for Personal, Commercial, Benefits & Medicare, Life & LTC, Annuities and agency-wide work.
- Enroll an individual client or a list after the content is complete.
- A Step 1 delay of 0 days becomes due immediately after enrollment and is processed by the sequence runner.
- Later steps become due according to their saved delay after the previous completed step.

Attachments

- Add a PDF or other supported file to one email or every email in a sequence.
- Saved attachments persist when the sequence is reopened or activated.
- Recipients see a named Open file action rather than a long private URL.

Human approval and reply safety

- Drafting, review and launch remain separate stages.
- Nothing is sent merely because content was generated or approved.
- Launch requires explicit confirmation; reply monitoring must be healthy.
- A detected reply pauses later automated outreach.

Video reviews

- Start or invite a client to a video meeting from the record.
- Meeting video is not retained; the recap and resulting actions can be filed to the timeline.

06 Team, reporting & governance

Give the principal visibility without losing ownership, history or agency separation.

Producers and seats

- Add producers with lines of business and commission split.
- Assign clients, policies, opportunities and tasks to the responsible person.
- Seat limits follow the selected plan.

Agency views

- Review premium in the pipeline, upcoming renewals, overdue tasks and producer activity.
- Use team oversight to understand individual workloads and follow-through.
- Filter book views by producer, carrier or line where available.

Working history

- Client timelines preserve communications and work updates.
- Archive and deletion actions are recorded for accountability.
- Sequence steps, enrollments and delivery events remain traceable.

Workspace separation

- Each agency’s data is isolated from other workspaces.
- Authorized users see the shared agency book according to their access.
- Private documents are stored per agency.

No-send safeguards

- Prepared content is not the same as launched outreach.
- Approval does not enroll, schedule or send.
- A separate launch confirmation controls enrollment and the first send.
- A broken reply-monitoring channel fails closed rather than sending without protection.

07 Plans & support

Choose the level that matches the size and operating needs of the agency.

Independent Agent — $49/month

- One user.
- Complete insurance CRM, voice entry, policy and renewal tracking, reminders and individual reporting.

Agency Starter — $299/month

- Up to 9 users.
- Shared agency records, team calendar, lead assignment, permissions and standard workflow templates.

Agency Growth — $699/month

- 10–20 users; 21+ users are $799/month.
- Advanced automation, multiple pipelines, producer performance reporting, structured onboarding and priority support.

Trial and annual option

- Start with a 14-day free trial; no credit card is required.
- Annual pricing offers two months free at the current published rates.

Support

- Email: support@clientpulse.ltd
- Phone: 386.286.8013
- In the app: use HELP from any screen.
- Tour: clientpulse.ltd/insurance/tour

Ready to see the insurance workspace?

Visit clientpulse.ltd/insurance for the overview, 3-minute tour and current pricing.