



SOLUTION GUIDE

Commercial Insurance Sales for Independent Agencies

Insure AMS · Built on HubSpot · Commercial Lines

**Commercial lines are your most valuable book. Build the system they deserve.
See how HubSpot changes everything.**

Why commercial needs a different system

Commercial insurance is the most valuable line your agency writes. Larger premiums, longer retention, higher lifetime value. But it also has the longest sales cycle and the most complexity.

Commercial sales are fundamentally different from personal lines:

- Sales cycles run 60–180 days, not 7–14
- Multiple stakeholders involved in every decision
- Producers need structured follow-up across months
- X-Dates drive timing — miss one and you wait a full year
- Handoffs between appointment-setters and producers break down without a system

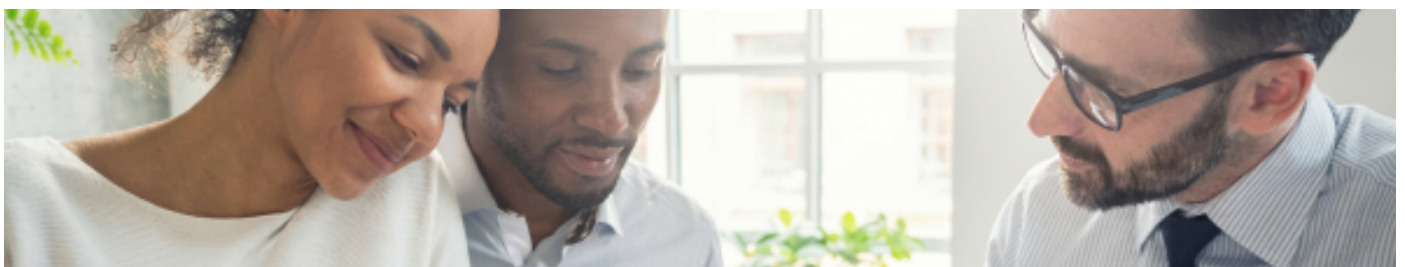
Your current AMS was built to manage policies after they bind. It was never designed to manage a B2B sales process with this level of complexity.

The real cost of no system

Think about your last 20 commercial prospects. How many got consistent follow-up across the full cycle? How many were lost simply because nobody circled back at the right time?

For most agencies, the answer is: most of them.

It's not because your producers don't care. It's because commercial sales require a system built for long-cycle B2B selling — and spreadsheets and memory don't cut it.



What Insure AMS builds for you

A purpose-built commercial sales system

Everything your producers need to manage long-cycle B2B deals — built on HubSpot, configured for insurance.

What we build inside your HubSpot

Every component is designed for the way commercial insurance is actually sold — not how personal lines work, and not how generic CRMs think sales should run.

- Commercial pipeline built for 60–180 day sales cycles
- Suspect management — track prospects before they become leads
- Lead management loops — automated re-engagement for stalled prospects
- Multi-stakeholder tracking — map every decision-maker on the account
- Appointment-setter to producer handoff — clean, tracked transitions
- Multi-touch follow-up sequences tied to X-Date capture
- Owner-level visibility dashboards — pipeline health at a glance

Their pipeline, their deals, their follow-up — all in one place, all visible, all moving forward.

Start with small commercial. The same system scales as you grow into mid-market. No rebuild required — just deeper configuration as your book expands.



The HubSpot Sales Workspace

Every morning, your producers open HubSpot and see exactly what needs to happen. No guessing. No digging through spreadsheets.

Their workspace shows:

- Deals that need follow-up today
- Tasks triggered by automation (calls to make, emails to send)
- Deals that have stalled and need attention
- New leads that just came in and need first contact
- Upcoming X-Dates to prepare for

They don't have to think about what to do next. The system tells them. This is what separates HubSpot from a traditional AMS — it drives action, not just storage.



Owner and manager visibility

As an owner, you see everything your producers see — plus conversion rates, response times, and total pipeline value. Real-time dashboards show:

- Team performance by producer
- Deal progress across every stage
- Pipeline health and forecast
- Activity metrics — who's working, who's not

No more asking for updates. No more hoping things are moving. You'll know — because the system shows you in real time.

How we get you there

We don't hand you a login and wish you luck. We build the system for you, configure it to your agency's commercial workflow, and train your team to use it.

Here's what the process looks like:

1. Configuration

We build your commercial pipelines, deal stages, automation workflows, sequences, and dashboards — all configured to commercial lines sales.

2. QA

A second team member reviews every workflow, trigger, and sequence before anything goes live.

3. Training

A live 90-minute session with your producers. They leave knowing exactly how to use the system for commercial prospecting.

4. Post-Launch Support

We check in after launch to optimize adoption, answer questions, and fine-tune workflows.

The full technical spec — including timelines, deliverables, and configuration details — is documented in our New Business Sales on HubSpot playbook.



Ready to build a real commercial lines operation?

You don't need more leads. You need a system that closes
the ones you already have.

The agencies that grow their commercial book aren't the ones quoting
more. They're the ones following up better, faster, and longer than
everyone else. That takes discipline — and a system built to enforce it.

[Book a Working Session](#)

We'll show you our commercial lines build and share
what's possible in 60 days.



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