



SOLUTION GUIDE

New Business Sales on HubSpot

Insure AMS · Built on HubSpot · Personal & Commercial Lines

A modern CRM and sales engine for independent insurance agencies, built on HubSpot and shaped for how agencies actually sell.

What this is

This is a standalone, production-ready sales platform built inside HubSpot. It gives independent insurance agencies a modern CRM and structured sales process for writing new business — personal and commercial lines.

It is not a plugin, not a demo environment, and not a template you have to figure out on your own. It is a fully configured system, delivered turnkey, with training and support included.

- CRM structure and contact management
- Sales pipelines for personal and commercial lines
- Automated follow-up sequences
- Lead capture and routing
- Dashboards and reporting
- Integration-ready architecture

You purchase a HubSpot license. We build the system inside it. You own it outright.

Who it's for

Independent insurance agencies that are growing and need more structure, visibility, and automation than their current AMS or spreadsheet setup can provide.

Agencies that want a real sales system — not just a policy management tool.

You may already have an AMS for servicing. This platform handles the front end — prospecting, quoting, follow-up, and closing — so nothing falls through the cracks before a policy is ever bound.



The offer at a glance

New Business Sales on HubSpot

A production-ready CRM and sales engine for independent insurance agencies, delivered turnkey inside your HubSpot instance.

What you get

A fully configured HubSpot CRM with pipelines, automations, sequences, dashboards, forms, and integrations — built for how insurance agencies actually sell new business.

- What you get: Fully built CRM + sales system inside HubSpot
- Timeline: 60 days or less
- What you provide: Access to your HubSpot instance, your sales process inputs, and team availability for training
- License prerequisite: Active HubSpot Sales Hub license (Professional or Enterprise)
- The model: One-time build fee + optional ongoing support

You purchase the HubSpot license. We build the system. You own it outright.

No lock-in. No per-user fees from us. No dependency on a third-party platform you don't control.



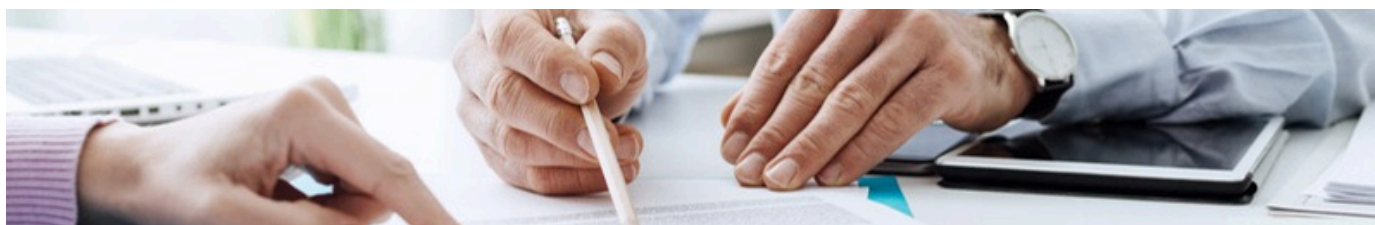
How we deliver

You purchase a HubSpot Sales Hub license. We build the entire system inside your instance. The process takes 60 days or less.

From purchase to launch:

- You provide access to your HubSpot instance
- We configure your CRM, pipelines, automations, sequences, and dashboards
- We QA everything before go-live
- We train your team in a live session
- We support you after launch

You are never left to figure it out on your own. The system is delivered ready to use on day one.



Why HubSpot, and why not the system you have now

Most agency management systems were built for servicing and policy administration — not for sales. Here's the difference:

- A locked-down CRM gives you: Static records, manual follow-up, no pipeline visibility, limited reporting
- This solution gives you: Automated sequences, structured pipelines, real-time dashboards, task-driven workflows, and full customization

HubSpot is built for sales teams. We configure it for insurance agencies.

What we build

The following areas are configured as part of every build:

Build areas:

- 1. CRM architecture and object setup**
- 2. Contact and company properties**
- 3. Personal lines sales pipeline**
- 4. Commercial lines sales pipeline**
- 5. Deal stages and lifecycle mapping**
- 6. Lead capture forms and routing**
- 7. Automated follow-up sequences**
- 8. Task creation and assignment workflows**
- 9. Email templates and snippets**
- 10. Dashboards and reporting**
- 11. Team permissions and views**
- 12. Integration configuration**
- 13. Documentation and training materials**

The 60-day timeline

Weeks 1-2: Discovery, access, CRM architecture

Weeks 3-4: Pipeline build, automations, sequences

Weeks 5-6: Forms, dashboards, integrations, QA

Weeks 7-8: Training, launch, post-launch support



What sign-off means

At the end of the build phase, you sign off on the completed system. This marks the transition from build mode to support mode.

After launch: support mode

Ongoing support includes access to a client portal, priority response for questions, continued optimization, and workflow adjustments as your team grows.

[Let's Talk](#)

A real CRM for new business, configured for insurance from day one.



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