



SOLUTION GUIDE

# Customer Service on HubSpot

---

Insure AMS · Built on HubSpot · Personal & Commercial Lines

**A complete service platform for independent insurance agencies, built on HubSpot and configured for how agencies actually service their clients.**

# What this is

This is a standalone, production-ready customer service platform built inside HubSpot. It gives independent insurance agencies a modern ticketing and service process for handling client requests — 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
- Service pipelines for personal and commercial lines
- Automated ticket routing and escalation
- Client communication workflows
- 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 with growing books of business and overburdened service teams that need more structure, visibility, and automation than their current setup can provide.

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

You may already have an AMS for policy administration. This platform handles the service side — client requests, endorsements, certificates, claims follow-up — so nothing falls through the cracks after a policy is bound.



## The offer at a glance

### Customer Service on HubSpot

A complete service platform for independent insurance agencies, built on HubSpot and configured for how agencies actually service their clients.

## What you get

A fully configured HubSpot Service Hub with pipelines, automations, ticketing workflows, dashboards, and integrations — built for how insurance agencies actually handle client service requests.

- What you get: Fully built service system inside HubSpot
- Timeline: 60 days or less
- What you provide: Access to your HubSpot instance, your service process inputs, and team availability for training
- License prerequisite: Active HubSpot Service 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.



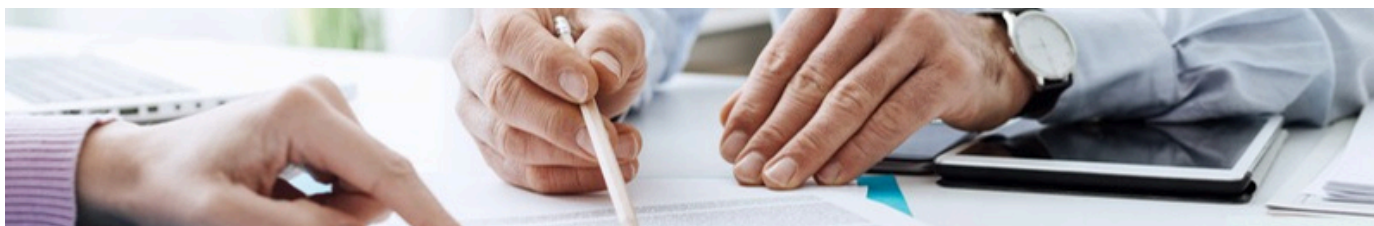
## How we deliver

You purchase a HubSpot Service 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 service pipelines, automations, ticketing workflows, 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 fix service first

Service is where client retention lives. Most agencies lose clients not because of price — but because of dropped balls, slow responses, and lack of follow-through on routine requests.

- Tasks (what most agencies use now): Informal, untracked, no visibility, easy to miss
- Tickets (what this system provides): Structured, automated, tracked, with SLAs and escalation built in

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

# What we build

Every build starts from one of two places: our standard service workflows, or your existing process. Either way, the following areas are configured:

## **Build areas:**

- 1. CRM structure and contact/company properties**
- 2. Service pipelines (personal and commercial lines)**
- 3. Ticket stages and lifecycle mapping**
- 4. Automated ticket routing and assignment**
- 5. Escalation workflows**
- 6. SLA configuration**
- 7. Client communication templates**
- 8. AI-assisted response drafting**
- 9. Knowledge base structure**
- 10. Dashboards and reporting**
- 11. Team permissions and views**
- 12. Integration configuration (email, forms, third-party tools)**
- 13. Documentation and training materials**

## **The 60-day timeline**

Weeks 1-2: Kickoff, access, CRM architecture, core build

Weeks 3-4: Pipeline configuration, automations, optimization

Weeks 5-6: Training, onboarding, team enablement

Weeks 7-8: Final optimization, QA, sign-off



# 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 service platform for insurance agencies, configured for how you actually work.



## **Insure Automation Solutions, Inc.**

2701 West Busch Boulevard

Suite 226

Tampa, FL 33618

+1 813-519-5601

[info@insureams.com](mailto:info@insureams.com)

[www.insureams.com](http://www.insureams.com)