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Insurance Agency CRM and Quoting

SERVICE
Software

YEAR
2023

A custom CRM and automated quoting platform designed for a Florida independent insurance agency, streamlining client management and enhancing efficiency for 1,200 active clients and 6 producers.

Industry: Finance Client: Confidential Service: Software

Quote turnaround 48 hrs to under 2 hrs	**Renewal retention 78% to 91%**	**$340K new premium opportunities identified**	**23% agency revenue growth**

The Challenge

A Florida independent insurance agency with 6 producers and 1200 active clients was tracking policies in a legacy system from 2009 and using paper quote sheets for new business. Renewal reminders were manual calendar entries. Producers had no shared visibility into their book of business. Cross-selling was ad hoc with no system to identify clients with coverage gaps. The agency was losing clients at renewal due to slow quote turnaround — an average of 48 hours vs competitors quoting in under 2 hours.

Our Solution

Built a custom agency management platform in ASP.NET Core 8. Client records consolidate all policies contacts notes and documents in one place. The quoting module pulls from carrier rate tables and generates comparison quotes as branded PDFs in under 5 minutes. Automated renewal workflows send reminder emails 90 60 and 30 days before policy expiry via Hangfire. A coverage gap analyzer scans each client record and surfaces cross-sell opportunities ranked by premium potential. Producers get individual performance dashboards showing pipeline conversion rates and renewal retention.

The Results

Quote turnaround dropped from 48 hours to under 2 hours. Renewal retention rate improved from 78% to 91% in the first year. The coverage gap analyzer identified $340K in new premium opportunities in the first 90 days. Agency revenue increased 23% year over year. Producer onboarding time for new staff dropped from 3 weeks

to 5 days.

Tech Stack

ASP.NET Core 8 · Blazor Server · SQL Server · Hangfire · QuestPDF · Azure · REST API

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