BATCH 8

Broker Communications to Drive Engagement

PROBLEM

We've gotten feedback from Heffernan that our status update emails are not helpful because they lack specific client/submission data.

We have also gotten feedback that excluding the email content in the Broker New Message email is not helpful. We should reconsider forcing the user to log into the product to see the content.

We also believe that our leads email would be more useful with additional data or as a summary email.

SOLUTION

We will meet brokers where they are at by providing more useful information within the email inbox.

DESIRED OUTCOME

We will meet brokers where they are at by providing more useful information within the email inbox.

We will increase engagement by delivering a weekly summary report - prevent HW from being out of site and out of mind.

THEME

Optimize for efficient submissions.

Bridge adoption from existing systems.

USER STORIES

01 **As a Broker user, I will receive an email from Highwing every Monday at 9am that provides a snapshot of Inbound Leads and Submissions in Flight.**

02 **As a Broker user, I will receive an email from Highwing when I receive a response in a conversation.**

03 **As a Broker user, I will receive an email from Highwing when an eSubmission is updated to "received" in TRV system.**

04 **As a Broker user, I will receive an email from Highwing when I have received a quote on an eSubmission.**