



CASE STUDY

Guided Solutions Drives Insurance Growth with Total Expert for Salesforce



Guided Solutions—a Baldwin Risk Partners (BRP) company—is an insurance brokerage firm that assists its clients in selecting the best property, casualty, and Medicare insurance for their individual budgets and needs.



The Situation

Guided Solutions wanted a full customer engagement platform tailored to the financial services industry—a purpose-built sales and marketing toolkit that would enable its brokers to market with ease, spend more time on prioritized sales opportunities, and preserve Guided Solutions’ brand and legal compliance requirements.

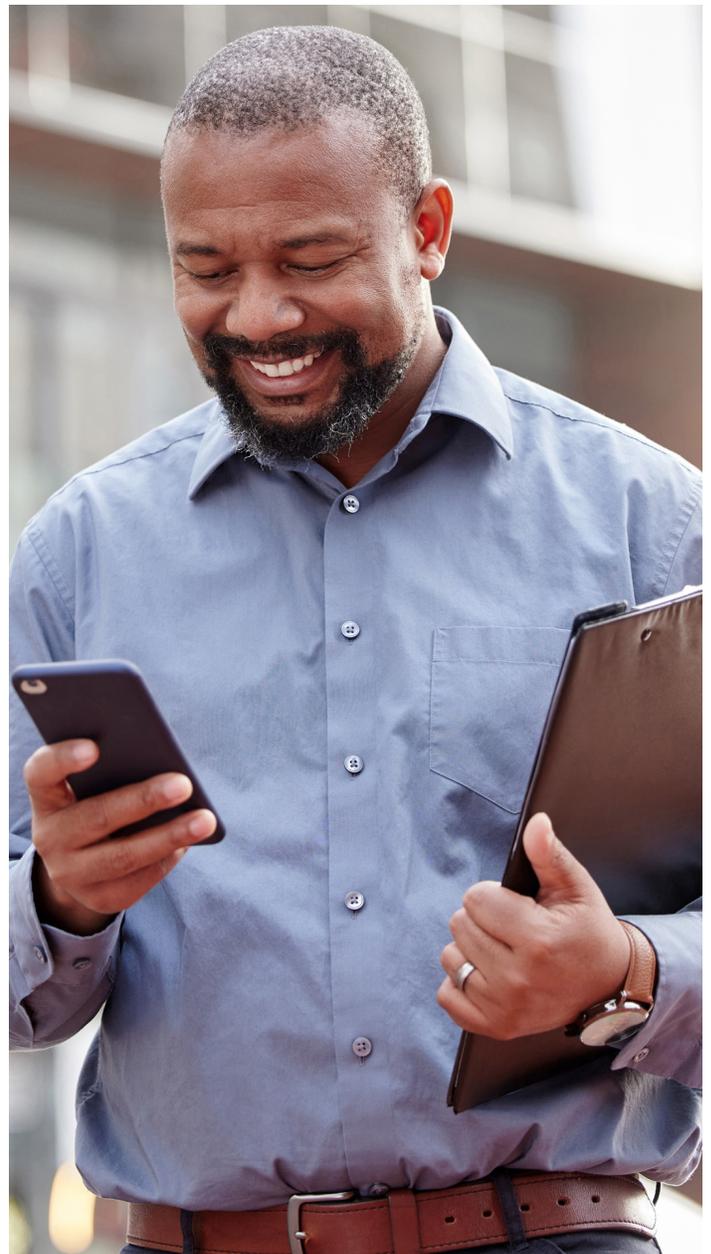
“By integrating our Salesforce CRM with Total Expert, we’ve modernized and automated our lead communications efforts and made our brokers’ jobs so much easier and more efficient.”

Cote Lewis
Senior Marketing Coordinator

The Solution

Leaders at Guided Solutions turned to the self-service sales productivity and marketing automation capabilities available through [Total Expert’s Salesforce integration](#)—an app from Total Expert that’s available on the Salesforce AppExchange and makes it fast and easy to connect the two systems.

With Total Expert, producers are empowered for the first time to create and deliver personalized, compliant messaging to their customers. By streamlining their outbound sales efforts, producers now spend less time developing costly, ineffective campaigns and more time engaging insurance customers.



“With Total Expert, we can easily manage clients and track which marketing messages each one receives. We’ve also become significantly more proactive in our client and prospect communications, so we can stay front-of-mind for whatever they need now and whatever they’ll need in the future.”

Leessa West
Marketing Manager

The Results

- Easy, unified access to customer data and campaign results
- Higher customer conversion rates
- Better visibility of uncontacted leads and opportunities
- Faster, more efficient team collaboration

Within the first month of implementing Total Expert for Salesforce, the Guided Solutions team began to seamlessly share data between the two platforms, allowing them to create comprehensive customer profiles and engage contacts via email and SMS—directly within Salesforce.

Because contact data syncs automatically, every new lead gets added to automated Journeys within Total Expert that begins nurturing them with relevant content and alerts the Guided Solutions team when there’s an opportunity for an agent to reach out directly.

Guided Solutions also uses Total Expert to re-engage leads who drop out or stop responding during a Journey (e.g., leads who received quotes but didn’t sign up for a policy). Guided Solutions has seen a significant lift in conversion rates of leads that were quoted and not sold since implementing Total Expert.

Since July 2023, Guided Solutions extended Total Expert from their P&C Sales Center operations to their Medicare wholesale and captive agents. The marketing team has been able to create and deploy 200+ pieces of branded, compliant Medicare collateral for agents to use during their busiest selling season.

Looking Ahead

Producers at Guided Solutions will soon be able to leverage self-serve branded compliant marketing materials that include their name, photo, and contact information. Brokers will be able to tailor their approach to each customer's situation thanks to unique insights into insurance purchasing triggers and the needs of customers in their market.

They'll also have access to a digital wallet that allows sales managers to set aside money within Total Expert for high performers to fund additional marketing activities. Their teams will be able to build more intelligent Journeys—like an automated "Age-In campaign" that will begin marketing Guided Solutions products to new Medicare recipients 15 months before they turn 65 and a recruitment Journey that will nurture prospective new brokers.

Ready to help your brokers be more productive and create customers for life?

[Explore Total Expert's insurance solutions](#)

[Learn more about the Total Expert for Salesforce integration](#)





About Total Expert

Total Expert is the purpose-built customer engagement platform trusted by more than 200 financial enterprises. The platform unifies data, marketing, sales, and compliance solutions to deliver the perfect customer journey across every financial milestone, in any market. Total Expert turns customer insights into actions to increase loyalty and drive growth for banks, lenders, credit unions, and insurance companies, and is now available to purchase through the AWS Marketplace and Salesforce AppExchange.