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HUBSPOT FOR AGENTS & BROKERS

HubSpot, Built for Independent Insurance Agencies.

Turn the client, policy, and X-date data in your AMS into new business, cross-sells, and retained renewals. Pre-configured for insurance. Synced with your AMS.

Live on HubSpot in weeks, not months

THE PROBLEM

Your best growth data is stuck in your AMS.

Your agency management system was built to service policies, not to grow your book. Producers can't see renewal dates or coverage gaps, marketing can't segment by line of business or carrier, and follow-up lives in inboxes and spreadsheets. Opportunities slip every week.

HubSpot for Agents & Brokers puts that data to work. Everything your producers, account managers and CSRs need is ready on day one, with no blank-portal build.

Pre-built for insurance

Policies, coverages, X-dates, and producers are built into HubSpot from day one. No blank-portal build.

With or without an AMS

Connect your AMS through Synatic AgencyFuse. No AMS? Our Stand-alone edition runs your book in HubSpot, and you can add sync later.

Automated from day one

Ready-made workflows and playbooks for renewals, X-date marketing, cross-sell, new-business follow-up and onboarding.

LINES OF BUSINESS

Built for every line you write

- **Personal Lines** — Auto, home and umbrella, with vehicle and driver schedules
- **Commercial Lines** — Business policies, coverages and location schedules
- **Life Insurance** — Life policies and coverages, plus cross-sell to your P&C clients

Contact Us

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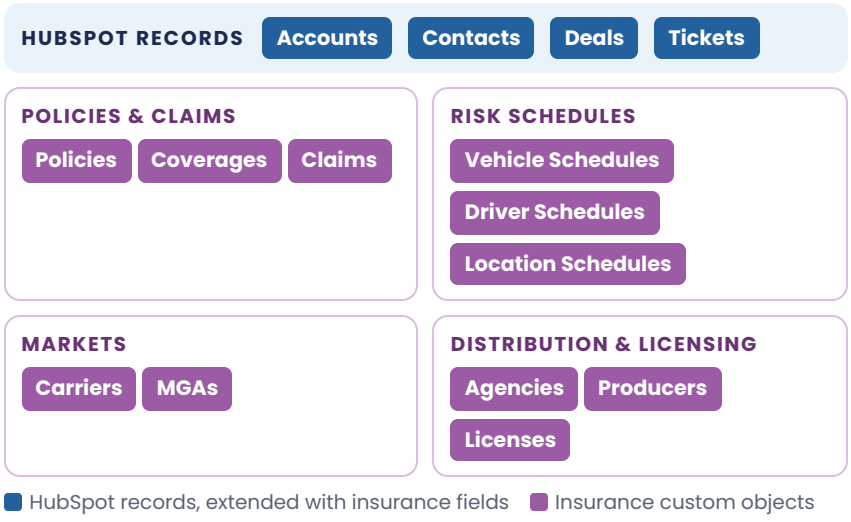
WHAT'S INCLUDED

Everything your agency needs to grow on HubSpot

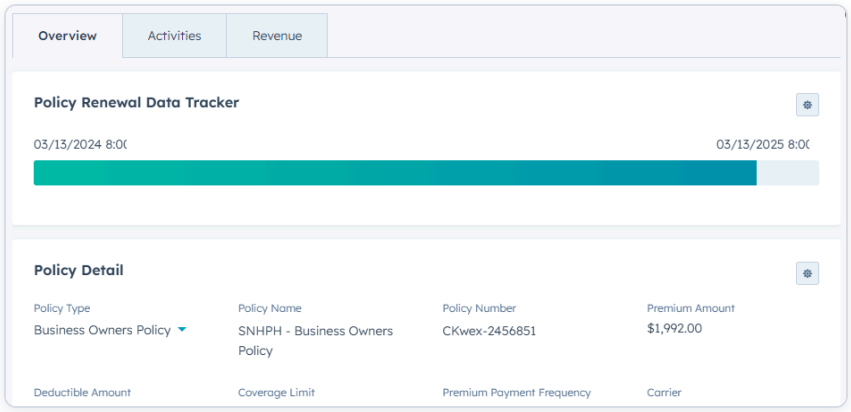
Insurance Data Model

HubSpot's Accounts, Contacts, Deals and Tickets extended with insurance fields, plus 11 insurance custom objects for personal, commercial and life lines, from policies and coverages down to vehicle, driver and location schedules.



Insurance Record Layouts

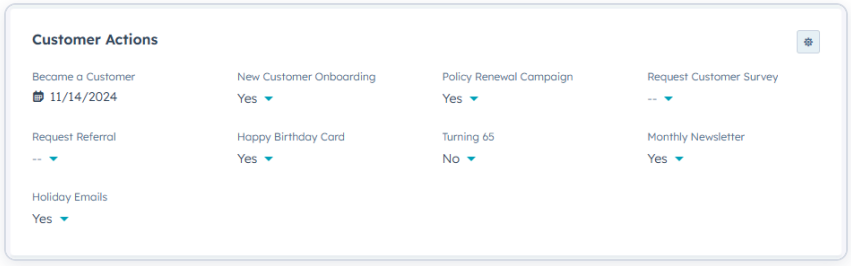
Policy details, premiums, carriers and renewal dates are front and center on every record, so your team sees the whole relationship at a glance.



Automated Workflows

Out-of-the-box marketing, sales and service workflows, ready to switch on:

- Policy renewals
- X-date marketing
- Cross-sell and upsell
- New-business follow-up
- Client onboarding



Views for Every Role

Pre-configured views, permissions and workspaces for each member of your agency team.

Agency Owners | Producers | Account Managers | CSRs

Producers see their pipeline and renewals; account managers and CSRs see their book of business and service tasks; owners see the whole agency.

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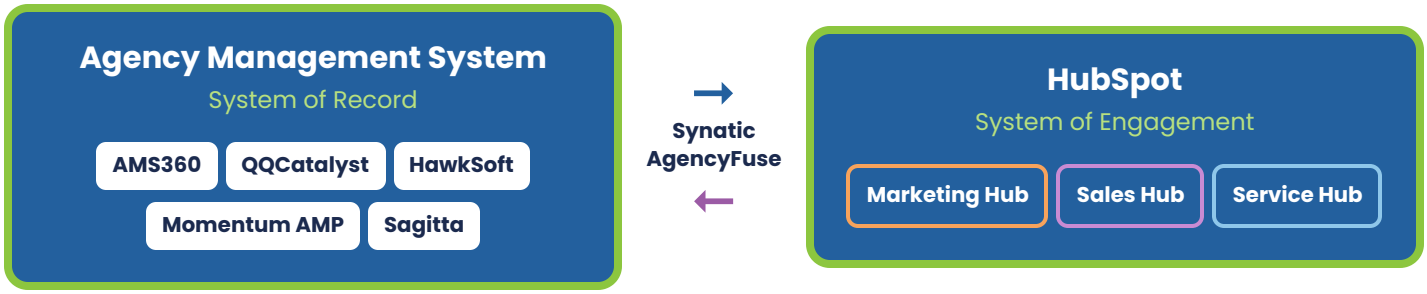
AMS INTEGRATION

AMS integration powered by Synatic AgencyFuse

We're Synatic's go-to partner for HubSpot integrations. Using Synatic AgencyFuse, we've mapped the HubSpot for Agents & Brokers data model to the APIs of the leading agency management systems, so client, policy, coverage, claims and prospect data flows into HubSpot automatically.



Your AMS remains your system of record. HubSpot becomes your system of engagement for clients and prospects.

300+ Pre-Mapped Fields

More than 300 fields are pre-mapped between your AMS and HubSpot, and you control what syncs and who can see it.

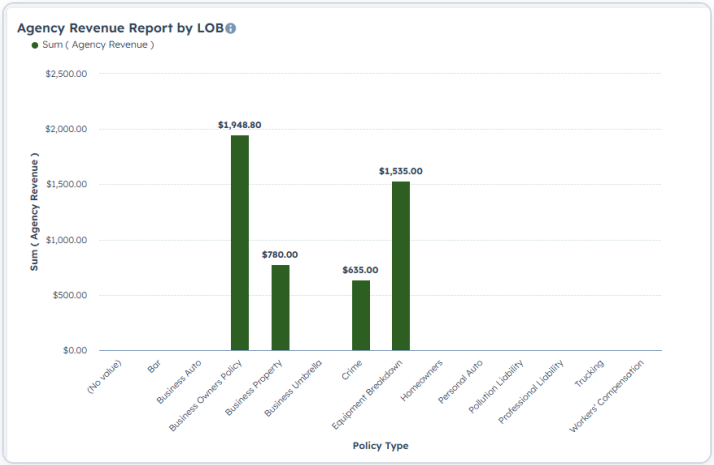
HubSpot Field Type	HubSpot Object	HubSpot Property Name	AMS360 Property Name
Date and time picker	Policy	Policy End Date	PolicyExpirationDate
Single-line Text	Policy	Policy ID	PolicyId
Single-line Text	Policy	Policy Name	
Single-line text	Policy	Policy Number	PolicyNumber
Dropdown Select	Policy	Policy Pipeline	
Dropdown Select	Policy	Policy Pipeline Stage	
Single-line text	Policy	Policy Source Details	
Single-line Text	Policy	Policy Source ID	
Date and time picker	Policy	Policy Start Date	PolicyEffectiveDate

Sample of pre-mapped Policy fields (AMS360 shown)

Reports & Dashboards

Pre-configured reports combining AMS and HubSpot data, ready to use from day one.

- Policies
- Retention
- Revenue
- Carriers
- Producers
- Pipeline



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EDITIONS

An edition for every agency

With AMS Integration
Agencies new to HubSpot

The complete solution: insurance data model, role-based views, automated workflows, and your AMS synced to HubSpot through Synatic AgencyFuse.

Stand-alone
Agencies without an AMS

Run your book of business in HubSpot with the full insurance data model and workflows. Add AMS sync later as you grow.

AMS Integration Only
Existing HubSpot customers

We install the data model, set up associations, configure AMS data mapping in AgencyFuse, then test and refine the sync.

HOW IT WORKS

Live on HubSpot in weeks, not months

1

Discover

We review your AMS, lines of business and sales process.

2

Deploy

We load the insurance data model, connect your AMS and turn on your workflows.

3

Grow

Your team is trained, and our managed services team keeps HubSpot tuned as you scale.

WHY TSI

Insurance people who happen to be HubSpot experts.

Our founder spent 20 years as a sales and marketing executive at insurtech startups, mid-size firms and Fortune 500 software companies before starting TSI in 2009. Our principal led application development at Hartford Life for 30 years. We've been a HubSpot partner since 2016. When you talk to us, you don't have to explain what an X-date is.

Support & Managed Services

After go-live, our team handles AMS sync monitoring, new workflows, reporting and user training, so your producers keep using HubSpot and your data stays clean.

FAQ

Does HubSpot replace my AMS?

No. Your AMS stays your system of record for servicing policies. HubSpot becomes the system of engagement your team uses to grow the book.

We don't have an AMS. Can we still use it?

Yes. The Stand-alone edition runs your book in HubSpot, and you can add AMS sync later.

Can I control which AMS data syncs?

Yes. You decide which data syncs to HubSpot and who can see it.

See HubSpot for Agents & Brokers in action

Whether you're new to HubSpot or already using it, book a demo to see how it can help your agency grow.

Book a Demo

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