

Marketing Automation

Improve client retention through automated communication, elevating and strengthening your client relationships.

Marketing Automation streamlines your brokerage's retention strategy by providing swift renewals and billing reminders, catering to what clients desire most. Automated flows accelerates the conversion of prospects into policyholders, optimizing every interaction. Beyond acquisition, it nurtures policyholders throughout the insurance lifecycle, fostering loyalty and promoting seamless renewals. Gain efficiency, improve retention and win the numbers game with Marketing Automation.

Core Features

- Automated Daily BMS Sync
- Unlimited Staff Accounts
- Send Unlimited Emails
- SMS Texts (500 Included)
- Reporting & Statistics
- Segment Contact Lists
- eDelivery (Optional Add-on)
- Newsletter Articles (500+)

How It Benefits Your Business

Process Policy Renewals Faster

Triggered by the policy data already loaded in your management system, our automated workflows create accurate pre-renewal and renewal letters that also include surveys.

Intelligent Document Delivery (Optional Add-on)

Enjoy the flexibility of auto delivering both manually uploaded eDocs and automated EDI downloads.

Automate Billing Reminders

With Marketing Automation, you also gain access to intuitive workflows that automatically send out billing reminders on your behalf. This time-saving workflow frees you up to focus on growing your business instead of collecting money on business you already have.

Cross-Sell on Autopilot

Let your clients know that you are the one-stop shop for all their insurance needs with engaging cross-sell campaigns such as home, auto, and much more.

Enhance Your Online Image

Encourage clients to showcase your business positively through Pathway's Online Review campaigns, strengthening and boosting your reputation.



eID Card

Marketing Automation

Automated Flows

- ✓ Renewal Workflows
- ✓ Proof of Insurance
- ✓ Billing Reminders
- ✓ Welcome Campaign
- ✓ Quote Follow-Up Series
- ✓ Prospect Series
- ✓ Cross-sell Campaign
- ✓ Refer-a-friend Campaign
- ✓ Online Review Campaign
- ✓ Happy Birthday Email
- ✓ Claims Series
- ✓ NPS® Email Surveys
- ✓ Lost Clients
- ✓ StormVision Weather Alerts (Canada)
- ✓ eDelivery (Optional Add-on)



Why Choose Pathway?

Pathway delivers cutting-edge insurance automation tools tailored for progressive agencies in the United States, Canada, and the UK. Anticipating industry trends and responding to evolving client needs, our intuitive cloud-based software is designed to propel medium to enterprise - sized brokerages to success.