One Big Media Company

GOHIGHLEVEL SNAPSHOT · INSURANCE AGENCIES (P&C AND LIFE)

Insurance Snapshot: Setup & Walkthrough Guide

Install, configure and launch every workflow, pipeline and form.

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OVERVIEW

What's inside

A complete GoHighLevel system for P&C and life agencies: instant quote follow-up, renewal reviews, cross-sell campaigns, and referral asks that run without your CSRs chasing anyone.

- 21 insurance-specific workflows with ready-to-send SMS and email copy
- Quote Pipeline with stages from New Quote Request to Policy Bound
- Policy Journey pipeline from Application Submitted to Referral Partner
- Reactivation pipeline for old quotes and lapsed clients
- Quote request form with lines of interest, current carrier, and renewal date
- Free Coverage Review booking calendar with confirmations and reminders
- Pre-renewal review automation driven by the Policy Renewal Date field
- Account Rounding cross-sell campaign for single-line clients
- Life-event fields (new home, teen driver, new baby) to trigger timely reviews
- Missed-call text-back that sorts quotes, service questions, and claims
- Review and service-recovery workflow that protects your Google rating
- Referral request and thank-you workflows with compliant reward wording
- 20 pre-filled custom values written for insurance agencies
- Setup guide, 6-lesson install course, KPI targets, and agency sales scripts

Pipelines

Sales Pipeline

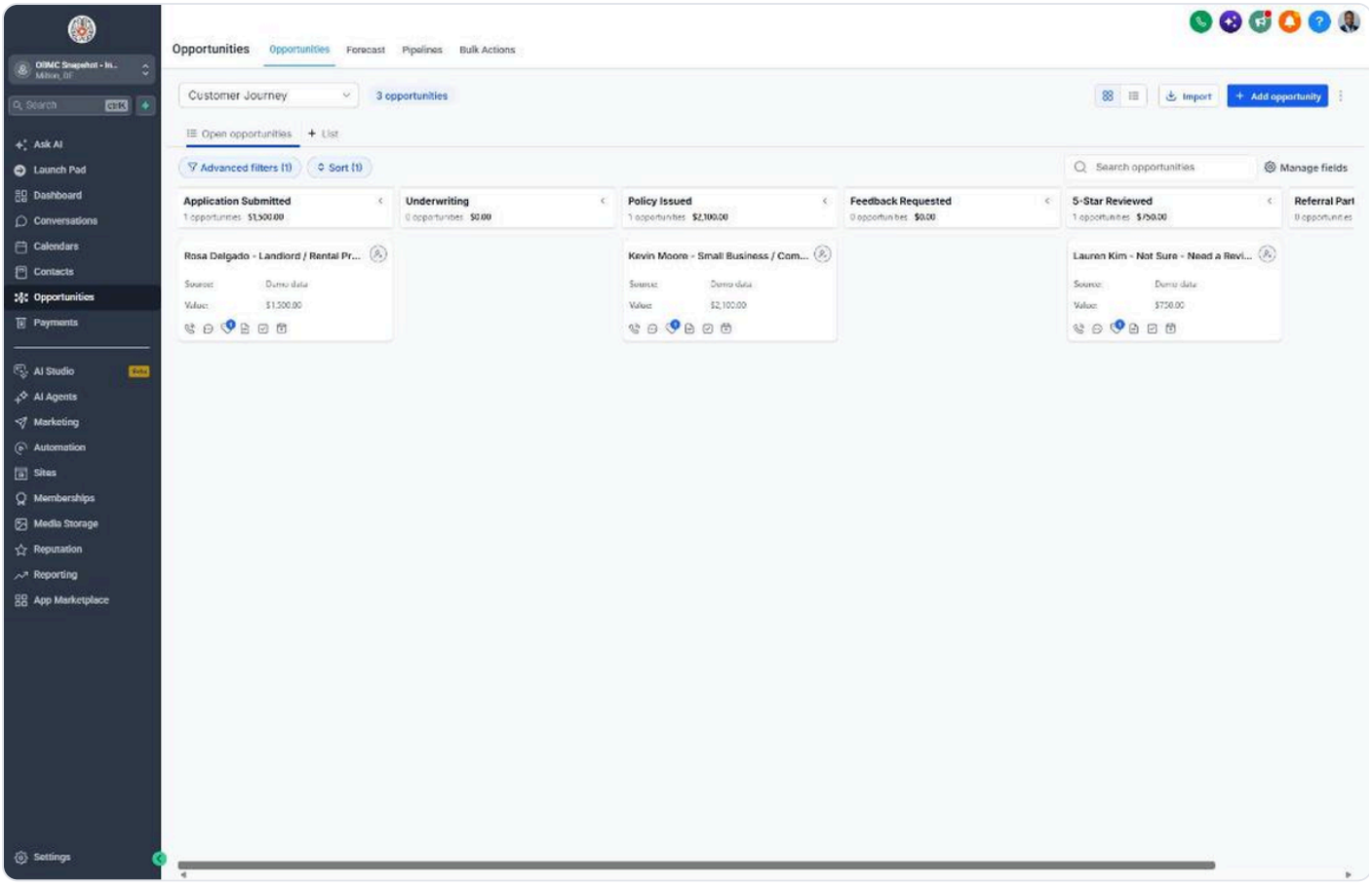
New Quote Request | Contacted | Review Booked | Review Completed | Quote Sent | Policy Bound | Not Bound | Long-Term Nurture

Customer Journey

Application Submitted | Underwriting | Policy Issued | Feedback Requested | 5-Star Reviewed | Referral Partner

Reactivation

Campaign Sent | Replied - Interested | Booked | Not Interested


Opportunities
Opportunities
Forecast
Pipelines
Bulk Actions
Customer Journey
3 opportunities
Import
Add opportunity
Open opportunities
List
Advanced filters (1)
Sort (1)
Search opportunities
Manage fields
Application Submitted
1 opportunities $1,500.00
Underwriting
0 opportunities $0.00
Policy Issued
1 opportunities $2,100.00
Feedback Requested
0 opportunities $0.00
5-Star Reviewed
1 opportunities $750.00
Referral Part
0 opportunities
Rosa Delgado - Landlord / Rental Pr...
Source: Demo data
Value: $1,500.00
Kevin Moore - Small Business / Com...
Source: Demo data
Value: $2,100.00
Lauren Kim - Not Sure - Need a Revi...
Source: Demo data
Value: $750.00
Ask AI
Launch Pad
Dashboard
Conversations
Calendars
Contacts
Opportunities
Payments
AI Studio
AI Agents
Marketing
Automation
Sites
Memberships
Media Storage
Reputation
Reporting
App Marketplace
Settings

INSTALL

12-step setup checklist

1. **Load the snapshot**
   In Agency view, go to Account Snapshots, find the OBMC Insurance snapshot, and click Load to load it into a new or existing sub-account. Choose to import all assets. Then switch into that sub-account.

2. **Fill in the business profile**
   Go to Settings > Business Profile and enter the agency's legal name, address, phone, website, and time zone. The time zone controls when texts and reminders send, so double-check it.

3. **Update custom values**
   Go to Settings > Custom Values and update Business Name, Owner Name, Business Phone, Booking Link, Review Link, Feedback Link, and Referral Link. Review the pre-filled offers and confirm the referral reward complies with your state's anti-rebating rules.

4. **Connect a phone number and register A2P**
   Go to Settings > Phone Numbers to buy or port a number, then complete A2P 10DLC brand and campaign registration in Settings > Phone Numbers > Trust Center. Turn on call forwarding to the agency's main line so missed-call text-back works.

5. **Set up email sending**
   Go to Settings > Email Services and connect a dedicated sending domain (for example mail.youragency.com). Add the DNS records shown, verify, and set the default from name to the agency or lead producer.

6. **Configure the coverage review calendar**
   Go to Calendars > Calendar Settings, open Free Coverage Review, assign producers, and set availability, duration, and buffers. Copy the calendar link into the Booking Link custom value.

7. **Customize the quote request form**
   Go to Sites > Forms > Builder and open Request a Quote. Confirm Lines of Interest, Current Carrier, and Policy Renewal Date are included, update the consent checkbox wording, and embed the form on the website's quote page.

8. **Review the pipelines**
   Go to Opportunities > Pipelines and review the Sales, Customer Journey, and Reactivation pipelines. Rename stages to match how the agency talks about quotes and binding if needed.

9. **Connect reviews**
   Go to Reputation > Settings and connect the agency's Google Business Profile. Copy the Google review link into the Review Link custom value so workflow 11 sends happy clients to the right page.

10 **Assign team notifications**
Go to Settings > My Staff and add each producer and CSR. In Automation > Workflows, open workflows 03, 11, 13, and 18 and set the internal notification steps to the correct users.

11 **Import the book and set renewal dates**
Go to Contacts > Import and upload a CSV export from your AMS with name, phone, email, Policy Renewal Date, and Policies In Force. Only import contacts with valid consent to receive texts and emails, and tag them by line of business.

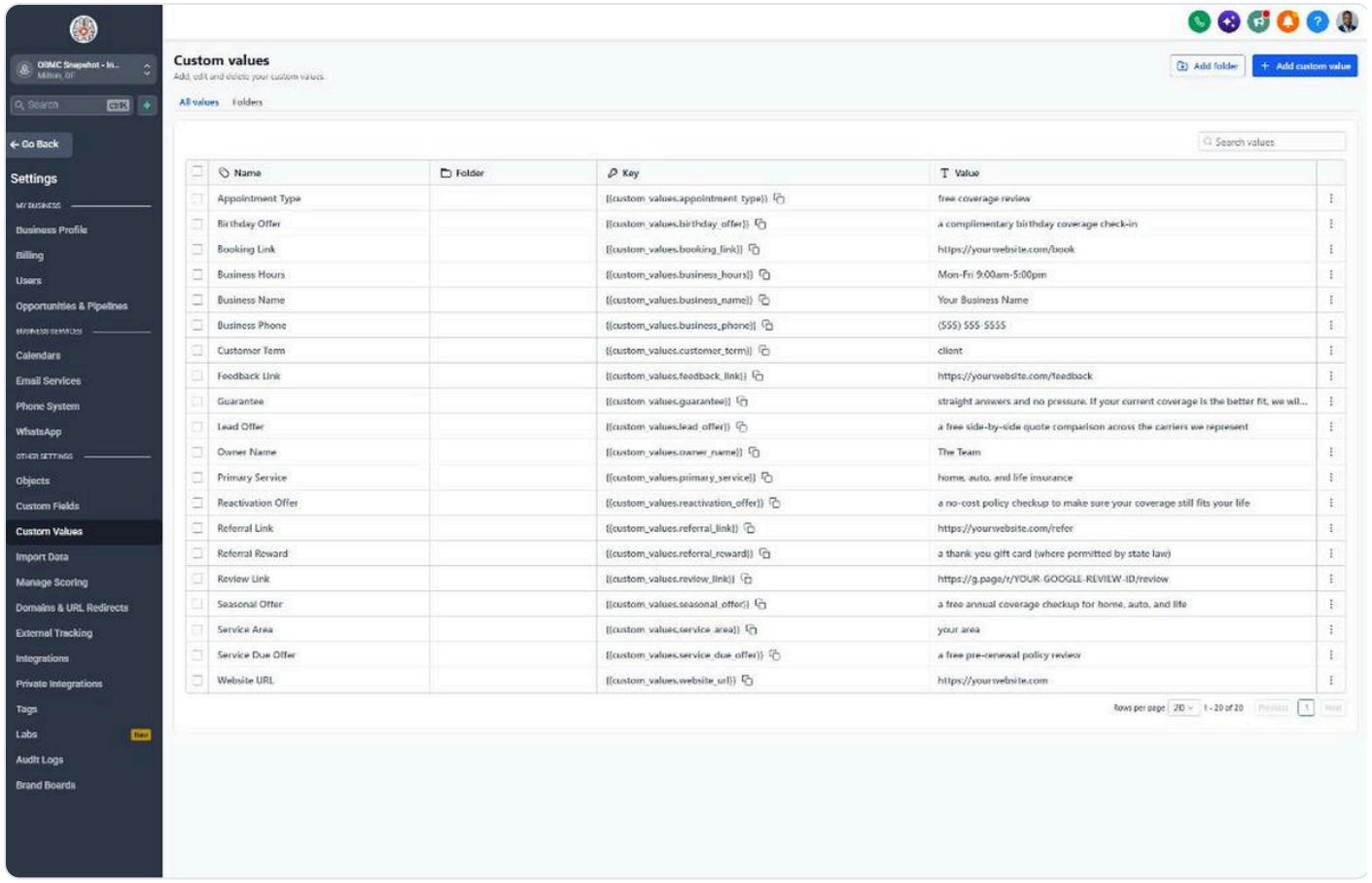
12 **Go live test**
In Automation > Workflows, publish all 21 workflows. Submit the quote form with your own phone and email, call the number and hang up, and book a test review to confirm texts, emails, reminders, and pipeline moves work end to end.

CONFIGURE

Custom values

Settings → Custom Values. Every workflow reads from these.

Custom value	Insurance default / what to enter
Business Name	Your business name
Business Phone	Your business phone
Owner Name	Your owner name
Website URL	Your website url
Booking Link	Your booking link
Review Link	Your review link
Feedback Link	Your feedback link
Referral Link	Your referral link
Service Area	Your service area
Customer Term	client
Appointment Type	free coverage review
Primary Service	home, auto, and life insurance
Lead Offer	a free side-by-side quote comparison across the carriers we represent
Guarantee	straight answers and no pressure. If your current coverage is the better fit, we will tell you
Referral Reward	a thank-you gift card (where permitted by state law)
Reactivation Offer	a no-cost policy checkup to make sure your coverage still fits your life
Seasonal Offer	a free annual coverage checkup for home, auto, and life
Service Due Offer	a free pre-renewal policy review
Birthday Offer	a complimentary birthday coverage check-in
Business Hours	Mon-Fri 9:00am-5:00pm


Custom values
Add, edit and delete your custom values.
Add folder
Add custom value
All values
Folders
Search values
Name
Folder
Key
Value
Appointment Type
{{custom_values.appointment_type}}
free coverage review
Birthday Offer
{{custom_values.birthday_offer}}
a complimentary birthday coverage check-in
Booking Link
{{custom_values.booking_link}}
https://yourwebsite.com/book
Business Hours
{{custom_values.business_hours}}
Mon-Fri 9:00am-5:00pm
Business Name
{{custom_values.business_name}}
Your Business Name
Business Phone
{{custom_values.business_phone}}
(555) 555-5555
Customer Term
{{custom_values.customer_term}}
client
Feedback Link
{{custom_values.feedback_link}}
https://yourwebsite.com/feedback
Guarantee
{{custom_values.guarantee}}
straight answers and no pressure. If your current coverage is the better fit, we wil...
Lead Offer
{{custom_values.lead_offer}}
a free side-by-side quote comparison across the carriers we represent
Owner Name
{{custom_values.owner_name}}
The Team
Primary Service
{{custom_values.primary_service}}
home, auto, and life insurance
Reactivation Offer
{{custom_values.reactivation_offer}}
a no-cost policy checkup to make sure your coverage still fits your life
Referral Link
{{custom_values.referral_link}}
https://yourwebsite.com/refer
Referral Reward
{{custom_values.referral_reward}}
a thank you gift card (where permitted by state law)
Review Link
{{custom_values.review_link}}
https://g.page/r/YOUR-GOOGLE-REVIEW-ID/review
Seasonal Offer
{{custom_values.seasonal_offer}}
a free annual coverage checkup for home, auto, and life
Service Area
{{custom_values.service_area}}
your area
Service Due Offer
{{custom_values.service_due_offer}}
a free pre-renewal policy review
Website URL
{{custom_values.website_url}}
https://yourwebsite.com
Rows per page
20
1 - 20 of 20
Previous
1
Next
Settings
Business Profile
Billing
Users
Opportunities & Pipelines
Calendars
Email Services
Phone System
WhatsApp
Objects
Custom Fields
Custom Values
Import Data
Manage Scoring
Domains & URL Redirects
External Tracking
Integrations
Private Integrations
Tags
Labs
Audit Logs
Brand Boards

WALKTHROUGH

All 21 workflows

01 · New Lead → Speed-to-Lead + 7-Day Follow-Up

TRIGGER Form 01 submitted, or tag 'start lead nurture' added

STEPS Tag new lead → Create opportunity in Sales Pipeline → New Lead → Instant SMS reply with booking link → Instant email: what happens next → Text + email alert to the team → Day 1 SMS follow-up → Day 2 email: why customers choose you → Day 4 SMS: quick question → Day 7 email: close the loop → Move to Long-Term Nurture

Stops when the lead replies

> Hi **first name**, it's **owner name** at **business name**. Got your quote request, thanks! Quick question so I quote the right thing: is this for auto, home, life, or a bundle? Reply STOP to opt out.

02 · Missed Call → Instant Text-Back

TRIGGER Inbound call is busy, no-answer or voicemail

STEPS Text-back within seconds → Create opportunity → New Lead (source: missed call) → Text alert to the team

Runs every time

> Hi, it's **business name**. Sorry we missed your call! Are you looking for a quote, have a policy question, or need help with a claim? Text us here and we'll get right back to you. Reply STOP to opt out.

03 · Customer Replied → Hot Lead Alert

TRIGGER Customer replies (SMS, email, chat)

STEPS Tag hot lead → Text the team the reply so nobody waits

Runs every time

04 · Appointment Booked → Confirm + Reminders

TRIGGER Customer books on the calendar

STEPS Tag appointment booked → Move deal → Appointment Booked → Confirmation SMS + email with reschedule link → Team alert → 24-hour reminder SMS → 2-hour reminder SMS

Runs for every booking

> Hi **first name**, you're confirmed for your **appointment type** with **business name** on **only start date** at **start time**. Have your current declarations pages handy. Need to change it? **reschedule link**

05 · No-Show → Reschedule Recovery

TRIGGER Appointment status changes to No-show

STEPS Tag no-show → Sorry-we-missed-you SMS + email with booking link → Team alert → Day 1 rebook SMS → Day 3 final SMS

Stops when they reply

> Hi **first name**, we missed you for your coverage review today. No worries, life happens. Want to pick a new time? **booking link**

06 · Appointment Completed → Proposal Prep

TRIGGER Appointment status changes to Showed

STEPS Move deal → Appointment Completed → Thank-you SMS → Team alert: send the proposal within 24 hours

Runs every time

07 · Proposal Sent → Follow-Up Sequence

TRIGGER Deal moves to Proposal Sent

STEPS Day 1 SMS check-in → Day 3 email: questions? → Day 6 SMS: hold your spot → Day 13 final email → Team alert if still no answer

Stops when they reply

> Hi **first name**, your quote options from **business name** are in your inbox. Any questions about limits or deductibles? Reply here and I'll walk you through them.

08 · Deal Won → Welcome + Customer Journey

TRIGGER Deal moves to Won

STEPS Tag customer, remove lead tags → Create Customer Journey deal → Scheduled → Welcome SMS → Welcome email: what happens next → Team alert

Runs every time

> Welcome to **business name**, **first name**! Your policy documents and ID cards will arrive by email. Save this number. It's your direct line for questions, changes, and claims help.

09 · Deal Lost → 30/60/90-Day Nurture

TRIGGER Deal moves to Lost

STEPS Tag lost → Day 30 check-in email → Day 60 SMS → Day 90 email with comeback offer → Move to Long-Term Nurture

Stops when they reply

10 · Job Completed → Feedback Request

TRIGGER Customer Journey deal moves to Completed

STEPS Move → Feedback Requested → Tag review requested → SMS + email asking for a private rating → Day 2 reminder SMS

Runs every time

> Hi **first name**, now that your policy is in place, how did we do? It takes about 30 seconds and helps us a lot: **feedback link**

11 · Feedback Submitted → Review Ask or Service Recovery

TRIGGER Form 02 submitted

STEPS If rating is 4-5: tag promoter, send Google review link, move → 5-Star Reviewed → If rating is 1-3: tag detractor, apology message, urgent team alert to fix it privately

Runs every time

12 · Happy Customer → Referral Request

TRIGGER Tag promoter added

STEPS Wait 3 days → Referral SMS with reward → Referral email with reward

Once per contact

> Hi **first name**, thanks again for choosing **business name**! Know someone with a new car, new home, or new baby? We'd be glad to give them the same no-pressure review: **referral link**

13 · Referral Received → Thank You + Team Alert

TRIGGER Form 03 submitted

STEPS Move referrer → Referral Partner → Tag referral partner → Thank-you SMS → Team alert with the friend's name and phone

Runs every time

14 · Database Reactivation Campaign

TRIGGER Tag 'start reactivation' added (bulk-tag an imported list)

STEPS Create Reactivation deal → Campaign Sent → SMS 1: still looking for help? → Day 2 SMS: past-customer offer → Day 5 email offer → Day 10 last-call SMS → Remove the campaign tag

Stops when they reply

> Hi **first name**, it's **owner name** from **business name**. It's been a while! Coverage options change every year. Want **reactivation offer**? Just reply YES. Reply STOP to opt out.

15 · Invoice Sent → Payment Reminders
TRIGGER Invoice sent
STEPS Wait 3 days → Friendly SMS reminder → Day 6 email reminder → Day 10 team alert for a personal call
Payments workflow (16) stops it when the invoice is paid

16 · Payment Received → Thank You
TRIGGER Payment received
STEPS Tag customer, remove past-due tag → Thank-you SMS → Team alert
Runs every time

17 · Birthday → Gift Offer
TRIGGER Contact's birthday (date of birth on file)
STEPS Birthday SMS with gift offer → Birthday email
Yearly

18 · Stale Deal Alert (7 Days No Movement)
TRIGGER Sales Pipeline deal idle 7+ days
STEPS Text + email alert to the team
Runs every time

19 · Service Due → Rebook Reminder
TRIGGER Tag 'service due' added
STEPS Service-due SMS with offer → Day 3 email → Day 7 final SMS → Remove the tag
Stops when they reply

> Hi **first name**, your policy renewal is coming up. Before it renews, let's make sure your coverage still fits. Any new drivers, home updates, or big purchases? Book **service due offer**: **booking link** Reply STOP to opt out.

20 · Seasonal Promo Campaign
TRIGGER Tag 'seasonal promo' added
STEPS Offer SMS → Day 2 email → Day 5 last-call SMS → Remove the tag
Stops when they reply

> Hi **first name**, it's **business name**. It's our annual coverage checkup season! Home values, vehicles, and families change. Want **seasonal offer**? Reply YES. Reply STOP to opt out.

21 · Account Rounding: Bundle & Cross-Sell Review

TRIGGER Tag 'niche campaign' added

STEPS Niche SMS → Day 2 email → Day 5 follow-up SMS → Remove the tag

Stops when they reply

Hi **first name**, **owner name** here. You have one policy with us, and many clients find it simpler to keep home, auto, umbrella, and life with one agent who reviews it all together. Want me to see if bundling fits you? Reply STOP to opt out.

MEASURE

Weekly KPIs

Metric	Goal	Where
Speed to first contact	Every new quote request contacted in under 5 minutes during business hours	Conversations and Contacts > contact timeline
Quote-to-review booking rate	Steadily increase the share of quote requests that book a coverage review month over month	Opportunities > Pipelines (Sales Pipeline, Review Booked stage)
Quote-to-bind rate	Track bound policies against quotes sent and aim to improve it every quarter	Opportunities > Pipelines (Quote Sent vs. Policy Bound) and Reporting
Policies per household	Increase the number of clients with 2+ lines each quarter through workflow 21	Contacts > Smart Lists filtered by Policies In Force
Pre-renewal reviews booked	Book a review with a meaningful share of clients reaching renewal each month	Calendars > Appointments and workflow 19 stats in Automation > Workflows
New Google reviews	Earn new Google reviews every month from newly bound clients	Reputation > Overview

Compliance notes

- Never promise savings or specific rates. Use phrasing like 'compare options' and 'discounts may be available where eligible'; final pricing depends on underwriting.
- Referral rewards can violate anti-rebating and inducement laws in some states. Confirm what is permitted with your state insurance department before offering gift cards or cash.
- A2P 10DLC registration and documented express written consent are required before texting. Keep TCPA-compliant consent language on every form and honor STOP replies immediately.
- Do not collect driver's license numbers, SSNs, or bank details by SMS or email. Gather them by phone or through your carrier's or AMS's secure portal.
- Make sure all producers who are named or who respond to leads hold active licenses in the prospect's state, and include licensing information on landing pages as required.

Mini-course outline

1. **Install the Snapshot and Brand It for Your Agency**: Load the snapshot and make every message sound like your agency.
2. **Capture Quote Requests and Respond in Moments**: Get every quote request into GHL and contacted before competing agents call.
3. **Book Coverage Reviews and Recover No-Shows**: Fill producer calendars with prepared prospects who show up.

4. **Work the Quote Pipeline and Follow Up Until Bound**: See every quote by stage and never let a 'thinking about it' prospect go quiet.
5. **Reviews, Referrals, and Reactivating Your Book**: Turn bound clients into Google reviews and introductions, and wake up old quotes.
6. **Launch Renewals and Account Rounding**: Turn your existing book into steady new policies with renewal reviews and cross-sell.

General guidance only. This is not legal, tax, medical or financial advice. Results depend on your offer, market and execution.