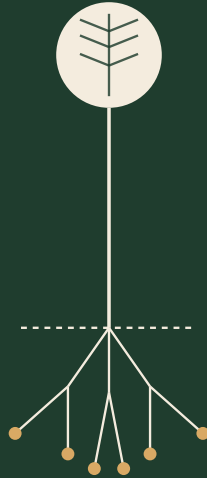


P A N D O S Y S T E M S



P A N D O

S Y S T E M S



C A S E S T U D Y · I N S U R A N C E O P E R A T I O N S

An insurance agency's
operational layer,
built from the inside.

Two years inside Kiesau Insurance Services.

pandosystems.io

An insurance agency's operational layer, built from the inside.

I'm a partner at Kiesau Insurance Services. Over two years, I built the system that runs underneath it — lead routing, quote flow, referral logic, and drip campaigns — replacing the spreadsheets and manual processes that came before.

The setup

By the time Kiesau was running on spreadsheets, three things were happening at once.

Leads were getting lost in inboxes. Quote turnaround was slow enough that deals were going to faster competitors. And the operational minutiae was buried inside the people who should have been writing business, not chasing paperwork.

That's the moment where most agencies hire another producer or buy another tool. I did neither. I built the system.



The build

What got built isn't a workflow. It's a system of workflows that talk to each other.

Lead routing. Every inbound — referral, web, walk-in — hits a routing layer before it touches a producer. Source, line of business, geography, and producer load all factor in. The producer who's best-placed gets the lead; the others don't have to manually triage.

Quote flow. Each prospect lands on a personalized page that already knows what they're shopping for. No generic intake form. The flow pulls context from the routing decision and tees up the quote in the format the carrier needs, with the producer's branding intact.



Referral routing. Strategic referral partners — financial advisors, realtors, mortgage brokers — get their own routing logic that tracks attribution and personalizes the experience for their clients. The buildReferralsSlug pattern means a referral partner sees their own clients flow through a branded experience without managing 53 separate landing pages.

Drip campaigns and nurture. Cold leads don't die. They sit inside sequences that re-engage them at the right cadence — renewal reminders, life event triggers, cross-sell opportunities. The system runs whether anyone is at their desk or not.

The whole thing runs inside GoHighLevel, with custom logic stitched on top to make it behave like a real operations stack instead of a checkbox CRM.



The result

Two years in, the operational layer at Kiesau runs continuously with minimal hand-on-the-wheel from ownership.

New leads route themselves. Quotes go out faster than they used to. Cold leads stay warm. Referral partners get a branded experience that scales with the relationship.

I'm not going to put numbers on this page. The metric I care about isn't a percentage on a dashboard — it's that I can step away from the agency for a week and the system keeps producing.

That's what an operational layer is for.



“I didn't build a workflow. I built a system of workflows that talk to each other.”



What this means for you

If you are an owner-led business that has outgrown spreadsheets and is ready to build the operational layer that turns marketing into revenue — that is the work I do.

The Kiesau build is the proof. The next one could be yours.

Available for one new engagement this quarter. Tell me what you are building.

austin@pandosystems.io

