

Is Your Growth Engine Stalled?



DISCOVER THE 5 HIDDEN GAPS SABOTAGING YOUR BROKER EXPERIENCE

Most insurance carriers have strong sales, marketing and distribution capabilities. The challenge usually isn't effort, it's coordination. One disconnected workflow or inconsistent broker experience can quietly create friction that slows engagement, sales momentum and go-to-market execution.

This checklist is designed to help identify the operational, sales and marketing gaps that may be slowing momentum.

EVALUATING THE SYSTEMS BEHIND SUSTAINABLE GROWTH

Check the areas that feel inconsistent, manual, delayed or difficult to scale.

PILLAR 1: DATA ORCHESTRATION & HYGIENE

FOCUS:

Turning your CRM from a "storage unit" into a "launchpad."

- ☐ **Lead Visibility:** Can you pinpoint exactly which touchpoints (email, digital ad, webinar, broker outreach) are driving broker engagement or quote activity?
- ☐ **Behavioral Signals:** If a broker repeatedly engages with a product or campaign, does your system trigger relevant follow-up automatically?
- ☐ **Shared Visibility:** Are marketing and sales teams looking at the same broker activity and engagement data?
- ☐ **Actionable Data:** Is your CRM helping teams make faster decisions or simply storing information?

PILLAR 2: FRICTIONLESS BROKER SALES ENABLEMENT

FOCUS:

Becoming the easiest ancillary carrier for brokers and sales teams to sell.

- ☐ **Service Access:** Can brokers quickly access current enrollment kits, product materials, co-branded assets and sales tools?
- ☐ **Time-to-Market:** Can updated collateral and product information reach your broker network quickly (within 48 hours)?
- ☐ **Sales Alignment:** Are your field teams, broker communications and marketing materials telling the same story?
- ☐ **Enablement Consistency:** Does every broker experience feel coordinated or dependent on individual reps?

PILLAR 3: OMNICHANNEL “SURROUND SOUND”

FOCUS:

Creating coordinated broker engagement across every broker touchpoint.

- ☐ **Channel Coordination:** Are your email campaigns, digital advertising, webinars, physical mailers, field outreach and website working together or operating independently?
- ☐ **Narrative Consistency:** Is the message brokers hear from your sales team aligned with what they see online and in campaigns?
- ☐ **Timed Engagement:** Are campaigns intentionally sequenced to reinforce awareness and action?
- ☐ **Broker Experience:** Does your outreach feel like one coordinated experience or multiple disconnected efforts?

PILLAR 4: PERSONA-DRIVEN DIGITAL EXPERIENCE

FOCUS:

Delivering the right message to the right audience without adding noise.

- ☐ **Segmented Experiences:** Do brokers, employers and members each have clear, audience-specific pathways through your digital experience?
- ☐ **Educational Value:** Are you providing useful thought leadership and sales enablement content or mostly product PDFs?
- ☐ **Content Relevance:** Can different audiences quickly find the information most relevant to them?
- ☐ **Employer Support:** Are employers receiving enrollment and communication materials that simplify decision-making?

PILLAR 5: GROWTH AGILITY & SCALABILITY

FOCUS:

Building a marketing engine that can scale with your business.

- ☐ **Product Launch Readiness:** If a new product launches tomorrow, how quickly could brokers begin selling it confidently?
- ☐ **Acquisition Readiness:** Could your current marketing infrastructure absorb a new acquisition or product without major disruption?
- ☐ **Campaign Agility:** Can your team launch coordinated campaigns quickly without excessive manual work?
- ☐ **Scalable Operations:** Is your growth dependent on heroic internal effort or supported by repeatable systems?

ELIMINATE BROKER FRICTION

If multiple areas feel inconsistent, manual, delayed or disconnected, it may be time to evaluate how effectively your marketing, sales and distribution systems are working together.

Responsory partners with insurance carriers to build coordinated growth engines that strengthen broker engagement, streamline operations and accelerate go-to-market execution.

With specialized insurance marketing expertise and an outside perspective, we help teams uncover inefficiencies, align processes and bring fresh ideas that reduce friction across the broker experience. Visit responsory.com to discover more or contact us at **262.782.2750**.