



HubSpot Manual

For Business Development Managers

— June 2025 —

Prepared by

MSI Agency Services and
Marketing Team

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Why a CRM is Important

A Customer Relationship Managers (CRM) platform is a tool that helps businesses manage interactions with prospects, clients, and partners. It centralizes data, automates workflows, and provides actionable insights to improve efficiency and collaboration.

Why HubSpot CRM?

HubSpot CRM is a powerful, user-friendly platform designed to streamline processes for business development teams. It offers tools for automation, reporting, and property management, all of which are tailored to help our team onboard agencies more efficiently and keep track of our data.

How HubSpot Helps Our Team

- 01 Centralized Data:** All contacts and company information is stored in one place, making it easy to access and update.
- 02 Automation:** HubSpot allows us to leverage automations to manage our agency force more efficiently.
- 03 Insights & Reporting:** Detailed reports allow us to track progress, identify bottlenecks, and optimize our interactions with prospects and partners.
- 04 Streamlined Collaboration:** Teams can work together seamlessly by sharing notes, tasks, and updates within the CRM.



What We've Built for You

HubSpot is your centralized platform for managing agency relationships, streamlining onboarding, and tracking activity. Here's a quick look at the key components set up to support your work.

Personalized Record Management

- Custom field in company & contact records
 - Tailored to our specific product needs, so every record includes relevant data points like agency type, product access, contact roles, and more
- Segmented Views & Filters
 - Quickly access pipelines by status, owner, or opportunity type

Onboarding & Product Access Automation

- Ticketing system with clear stages
 - Ready for onboarding, documents requested, documents being reviewed, sent to legal, ready for setup, welcome email, and completed
- Workflows automatically trigger:
 - Email notifications to relevant internal teams
 - Tasks for BDMs when actions are needed
 - Onboarding emails are automated to new partner

E&O Renewal Tracking

- Automated reminders when an agency's E&O policy is approaching expiration.
- Internal tasks & emails to prompt timely follow-up and ensure compliance before renewal deadlines.

Real Time Alerts & Task Assignments

- Internal notifications for:
 - Key field changes (e.g. appointment status, new access granted)
 - Completion of open tickets
 - Form completed by contacts
- Assigned tasks ensure nothing slips through the cracks

Why HubSpot - Stats Worth Knowing

BDMs close 23% faster using HubSpot

Personalized follow-ups increase engagement by 42%

Workflows save 6+ hours/week

Full visibility across your book of business

Your Roll in the System

As a BDM, HubSpot is your command center:

- Track agency progress through onboarding
- Stay on top of product access and compliance
- Know who to follow up with and when
- Keep your territory organized and prioritized

Company & Contact Properties



Company Properties

Prospect Status Card

- Prospect Status
 - For unassigned prospects
 - Ready for Assignment
 - Manual Movement by BDM
 - Researching
 - Active Dialogue
 - Declined Prospect/Pass
 - Prospect Declines
 - Automatic movement through ticket process
 - Ready for Onboarding
 - Onboarding documents requested
 - Reviewing documents
 - Agreement sent to legal
 - Ready for Setup
 - Onboarding Complete
- Lead generation - how the lead came to MSI
- Quick Decline Email
 - select 'send email'
 - Will send a task to Shayna Oliver to send an MSI-branded email from 'agency services'
- Potential Partner - Information Needed
 - Select 'Send Information Form'
 - Will automatically send an MSI-branded email to the main contact on the company file to fill out more information regarding the agency
- Product Interest
 - choose what the agency could be interested in, now or in the future
 - CGL, Cyber, E&S HO, Admitted HO, Commercial Flood, Comm Hab., Investor Product

▼ **Prospect Status**

[Actions](#)
▼
⚙️

Prospect Status
--

Lead Generation
--

Quick decline email
--

Potential Partner - Information Needed
--

Product Interest
--

Agency Information Card

- Company owner = BDM owner
- Company Status
 - Active partner
 - Prospect
 - Pending Setup (**will auto select during onboarding ticket**)
 - Terminated
 - Declined Prospect (**will auto select if "declined prospect" is selected in prospect stats card**)
 - Sub Deactivated by MSI
 - Sub Removed by Master
- Actively Quoting
- Company Type
- Agency Code
 - Set by Michelle during onboarding
- Product Access
 - Set automatically after the BDM form is submitted during the onboarding process

▼ **Agency Information**

[Actions](#)
▼
⚙️

Company owner
Shayna Oliver

Company Status
Active Partner

Actively Quoting
--

Company Type
-- ▼

Agency Code
1113

Product Access
-- ▼

IVANS
--

Company Properties

The below cards will be updated automatically when the “New Agency - BDM Form” is submitted in the onboarding process

Admitted Home Card

- Access States (admitted)
 - All 50 states are available to select
- API Integration (Admitted)
 - Yes or NO
- Appointed Companies (admitted)
 - Spinnaker, CNI, QBE, BRIE, TIC
- Bill Type
 - Direct Bill or Agency Bill

Admitted Home
Actions ▼ ⚙️

Access States (Admitted)
-- ▼

API Integration (Admitted)
-- ▼

Appointed Companies (Admitted)
-- ▼

Bill Type (Admitted)
--

E&S Home Card

- Access States (E&S)
 - All 50 states are available to select
- Appointed Companies (E&S)
 - SSIC or TSIC
- Programs (E&S)
 - Mainstreet, Affluent, or HNW
- Bill Type
 - Direct Bill or Agency Bill
- API Integration (E&S)
 - Yes or No
- Wholesale Inspection Authority (E&S)
 - Yes or NO

E&S Home
Actions ▼ ⚙️

Access States (E&S)
--

Appointed Companies (E&S)
--

Programs (E&S)
--

Bill Type (E&S)
--

API Integration (E&S)
--

Wholesale Inspection Authority (E&S)
--

Personal Flood Card

- Access States (Flood)
 - All 50 states are available to select
- Appointed Companies (Flood)
 - Hiscox or Sutton
- Bill Type (Flood)
 - Direct Bill or Agency Bill
- Tech Integration (Flood)
 - DTC or API

Personal Flood
Actions ▼ ⚙️

Access States (Flood)
--

Appointed Companies (Flood)
--

Bill Type (Flood)
--

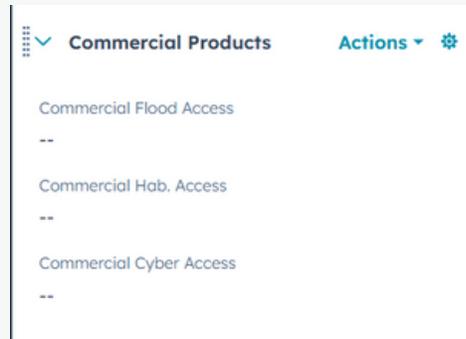
Tech Integrations (Flood)
--

Company Properties

Commercial Products Card

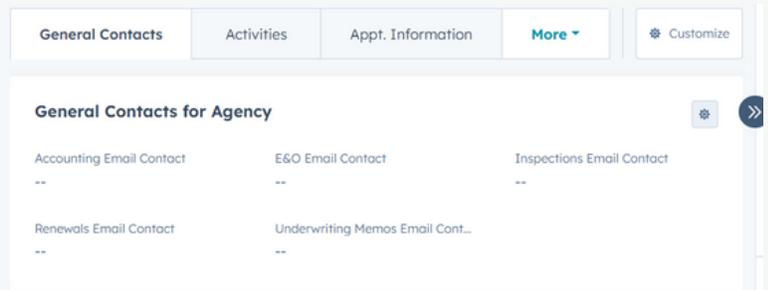
- Commercial Flood Access
- Commercial hab. Access
- Commercial Cyber Access

All 50 states are an option to select under each



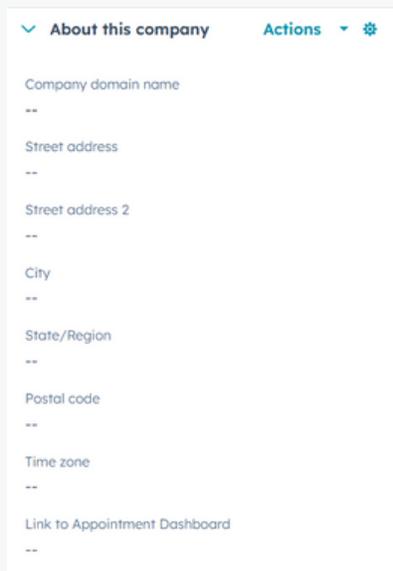
General Contacts

- Contact emails for the following:
 - Account email contact
 - Renewals email contact
 - E&S email contact
 - Inspections email contact
 - Underwriting memos email contact



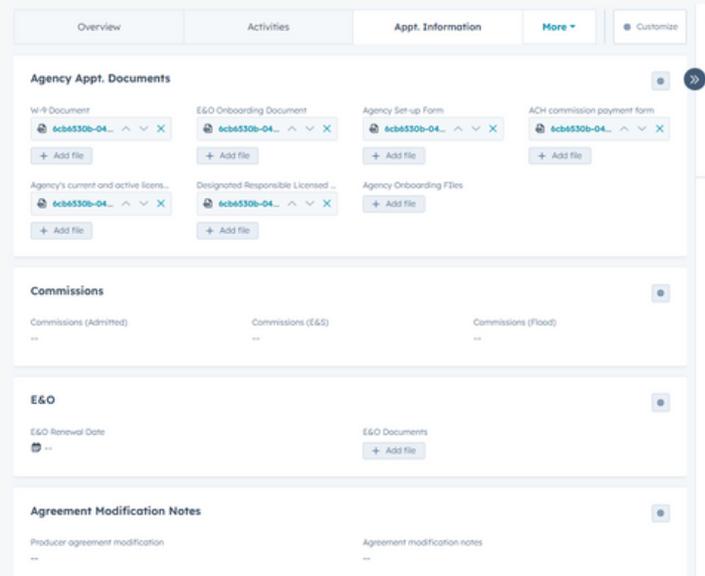
About this company

- General information inputting when the company is created by the BDM or Agency Services Team



Appt. Information

- Agency Appt. Documents
 - Uploading automatically during the onboarding process
- Commissions
- E&O renewal date and documents
- Agreement modification notes



Contact Properties

About this contact

- Agent Status
 - Active
 - No longer with agency
- Job title
- Email
- Phone number
- Contact owner (BDM who owns agency)
- Agency code (will match primary company)

▼ About this contact Actions ▾ ⚙

Agent Status
Active

Job title
Testing

Email
shayna.oliver@msimga.com

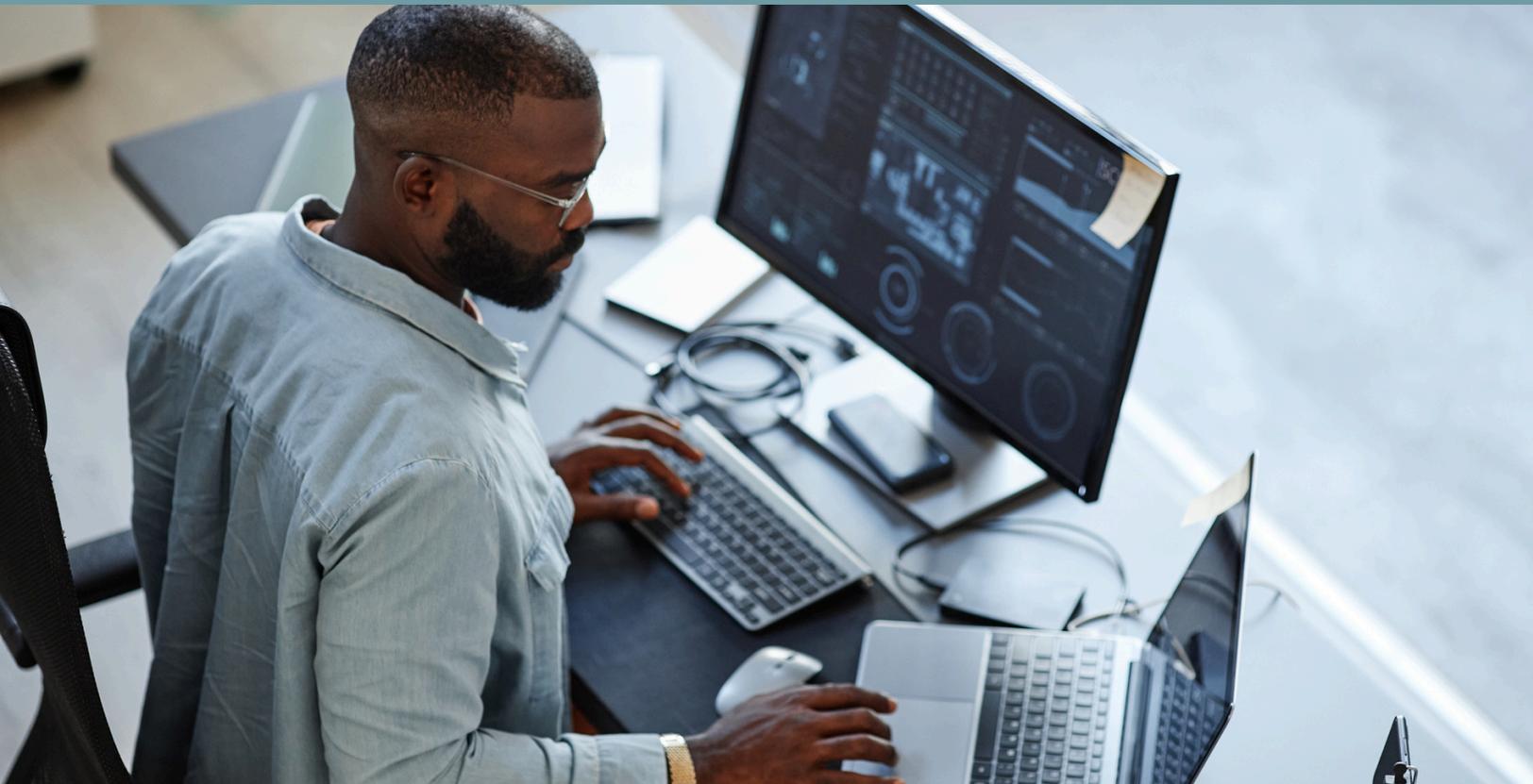
Phone number
--

Contact owner
Shayna Oliver

Last contacted
--

Agency Code
--

Prospecting Automations



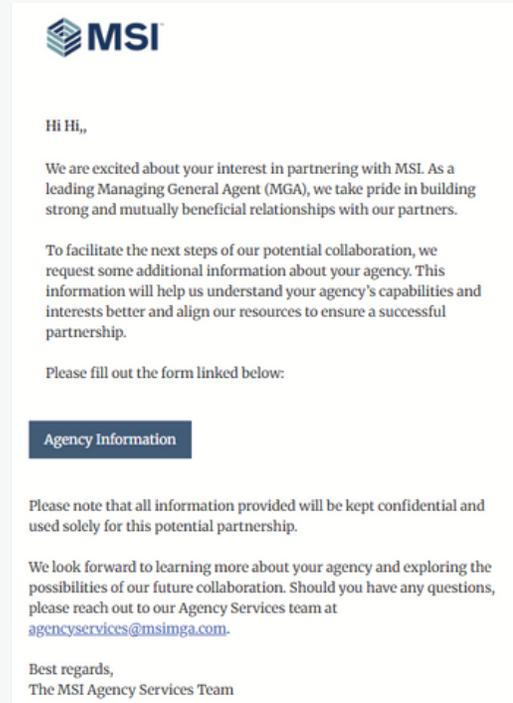
Potential Agency Information Form

PURPOSE

This email is intended for the Principal Agent listed on record and includes a link to a form designed to gather additional details about the agency. The information collected will help us better understand the agency's capabilities and product need.

TRIGGER PROPERTY

The email is triggered when "Potential Partner - Information Needed" under the 'Prospect Status' card is turned to "Send Information Form."



Information Form - Reminder Email

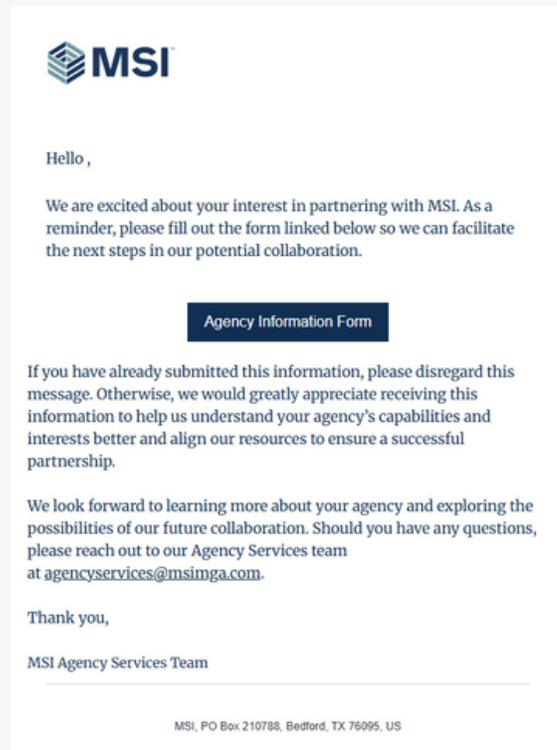
PURPOSE

This email serves as a reminder to fill out the potential agency information form we previously sent to the contact on record.

TRIGGER PROPERTY

If the Agency Information form has not been filled out 7 days after the initial email, this reminder email will go out.

If the form has been filled, the contact will not receive this.



Quick Decline Email

PURPOSE

This email serves as a formal notice to inform the company contact on record that we will not be moving forward with a partnership. It is specifically intended for recipients with whom we have not engaged in detailed or in-depth discussions regarding collaboration.

TRIGGER PROPERTY

A task for Shayna Oliver is triggered when “Quick Decline Email” under the ‘Prospect Status’ card is turned to “Send Email.”

Shayna Oliver in marketing will manually send the MSI Branded email to the contact on file within the company record. It will come from “Agency Services.”



Hello Hello,,

Thank you for reaching out and for your interest in partnering with MSI. We are inspired by the important work you’re doing to serve your clients and your community.

In our ever-changing industry, our needs and strategies are constantly evolving. While a partnership in your area doesn’t align with our current objectives, we acknowledge that the future may bring new opportunities. We have securely stored your information and will revisit it as our future needs change.

We appreciate you connecting with us!

Best regards,
The MSI Team

Potential Agency Information Form

PURPOSE

This form will be used to gather additional information for a prospect agency.

TRIGGER PROPERTY

This form will be sent within an email and will be triggered by the BDM selecting “send information form” under the “potential partner - information needed” field.

A notice will be sent to the company owner when form has been submitted

We'd love to hear from you! Please fill out the form and we'll get back to you as soon as possible.

Company Name*

DBA Name

Agency State/Region* Agency Total Written Premium Volume*

PL vs CL Split* Website URL*

Main Contact Information

First Name* Last Name*

Email* Phone Number

Job Title

us +1

[Next](#)

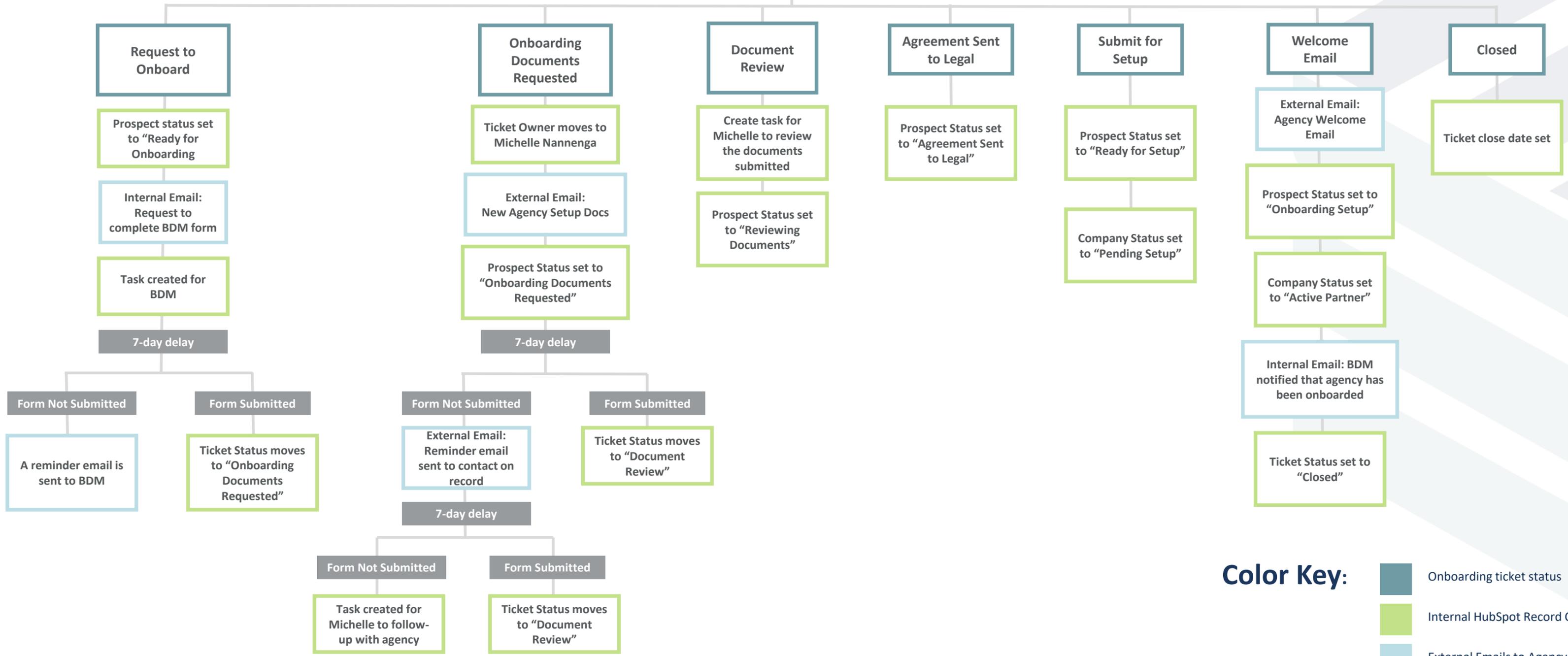
Onboarding Process



Onboarding Ticket Workflow

Open a new onboarding ticket
 Provide information needed on the ticket and associate the company and main contact (make sure contact is added into HubSpot before opening ticket)

Standard naming convention:
 "Company name - Onboarding"



Color Key:

- Onboarding ticket status
- Internal HubSpot Record Change/Task Sent
- External Emails to Agency

Onboarding Automated Emails



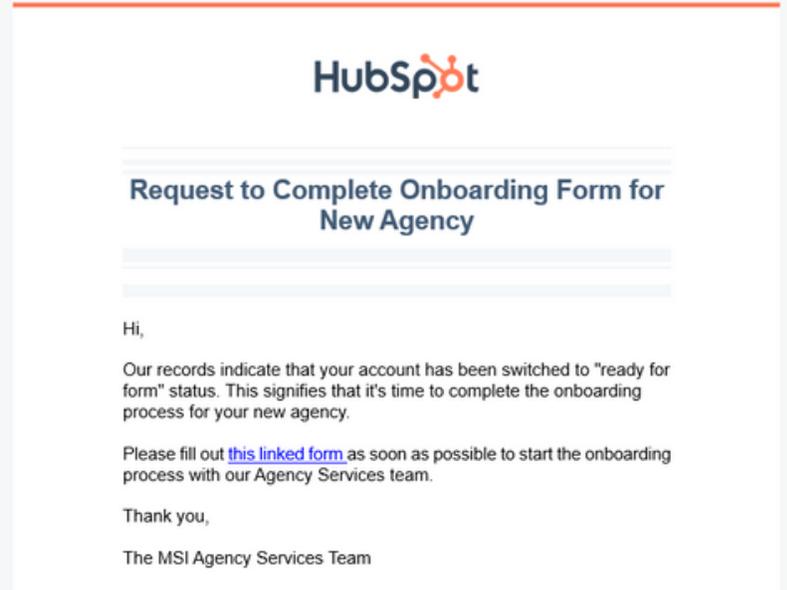
BDM Form Email - Internal to BDM

PURPOSE

This email will be sent to the BDM who owns the company record. This will contain a form link for BDM to fill out when a new agency is needing to be onboarding. The information will go to the Agency Services Team.

TRIGGER PROPERTY

The email is triggered when the BDM opens a new ticket with the "Onboarding" pipeline, Status of ticket must be set to "Request to Onboard"



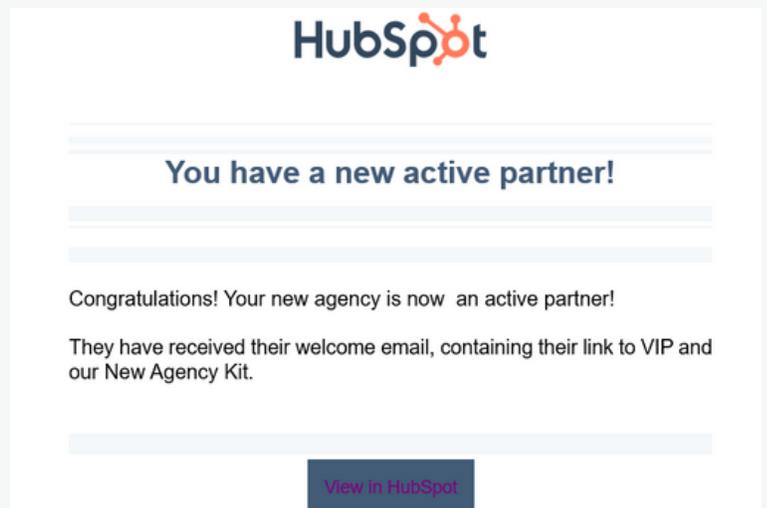
New Active Partner - Internal to BDM

PURPOSE

This email will be sent to the BDM who owns the company record. This is to inform them that their agency has completed the Onboarding process and is now an active partner.

TRIGGER PROPERTY

This email is triggered when the welcome email is sent to the contact on record and the onboarding ticket is closed. To view what company it belongs to, simply click "View in HubSpot" button.



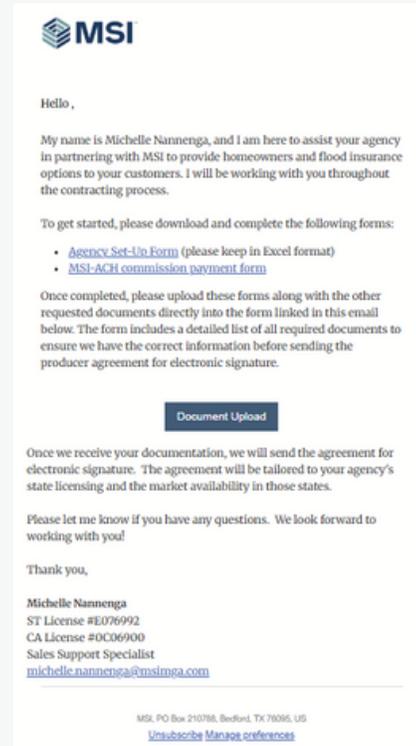
New Agency - Documents Needed

PURPOSE

This email is intended for the Agency Service Team to initiate the onboarding process for a new agency. It includes a link to a form where the agency can securely upload all requested documents, ensuring a smooth and efficient onboarding experience.

TRIGGER PROPERTY

The email is triggered after the BDM submits the new agency form, and the ticket status auto changes to “Onboarding Documents Requested.”



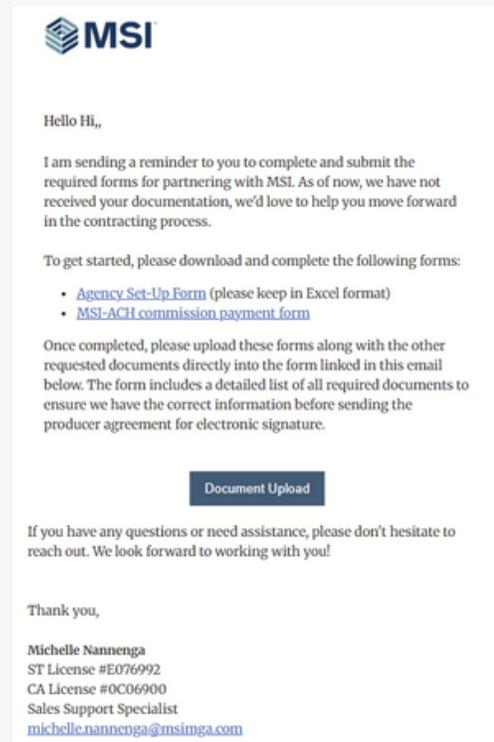
Documents Reminder Needed

PURPOSE

This email is a reminder email to the agency for them to submit their onboarding documents needed by the Agency Services Team. It includes the same documents and upload link as the initial email.

TRIGGER PROPERTY

The email is triggered if the “document upload” form has not been submitted by the agency within 7 days of the initial email.



Agency Welcome Email

PURPOSE

This email is sent to the main contact on the company record once the onboarding process is complete. This email includes a login link to VIP, our New Agency Kit, and additional information the agency will need to know.

TRIGGER PROPERTY

The email is triggered once the agency is setup in VIP, and the Agency Services Team changes the ticket status to “Welcome Email”

Resources & Support

We've linked the [MSI Agency Kit here](#), which includes key contacts, a comprehensive guide to our personal lines programs, and everything you need to get started. If you have any questions or need assistance, don't hesitate to reach out—we're here to help and would love to hear from you!

Key Highlights

Here's a quick overview of what makes MSI stand out and how we're committed to supporting your success:

- **AM Best Rated Paper:** Rest assured, you're backed by top-rated carriers.
- **VIP Technology Platform:** Quoting and binding is fast, easy, and efficient.
- **Exclusive Distribution Partners:** We work with hand-selected agencies like yours, ensuring very limited competition in your market.
- **Bulk Quoting Available:** Save time and streamline your quoting process.

For more details, please refer to the linked MSI Personal Lines Agency Guide.

We're Here for You

Thank you again for choosing MSI. We're excited to partner with you and help you succeed in offering personal lines market options. If there's anything we can do to support you, please don't hesitate to reach out.

Best regards,

The MSI Personal Lines Team



Hello Hi,,

Welcome to the MSI family! We're thrilled to have you as a valued partner and look forward to working together to help grow and maintain your personal lines insurance book of business.

Getting Started

Our technology team is currently setting up your agency's access to our cutting-edge rating platform, VIP. Within the next few days, you'll receive an email from customerservice@msimga.com containing your unique user ID and password to log in. Once you receive your credentials, you can easily access the platform using the button below:

[LOGIN TO VIP](#)

Stay Connected

To keep you informed and up to date, we'll send regular communications to all registered users with updates on our programs, products, and enhancements. Be on the lookout for these emails to ensure you don't miss any important information.

Onboarding Forms



New Agency BDM Form - Internal

PURPOSE

This form is the BDM Company Owner to fill out once the agency is ready to begin onboarding. Additional pages will appear based on product access selected. You can also upload any documents needed for the Agency Services team at the end of the form.

TRIGGER PROPERTY

This form will be automatically sent to your email by selecting "Ready for Onboarding" in the 'Prospect Status' field.

Congratulations on securing a new agency! Please fill out the information below to begin the onboarding process.

Agency name*

Main Contact - First Name* Main Contact - Last Name*

Email*

Phone number

us +1

Company Type*

Retail Admitted Product

Wholesale E&S Product

Franchise Flood Product

Next

Agency Document Upload Form

PURPOSE

This form will be sent to the contact on the agency record requesting for their onboarding documents to be uploaded.

TRIGGER PROPERTY

This email/form is triggered when the New Agency - BDM Form is submitted, and the ticket status changes to "Onboarding Documents Requested."

We are excited to begin your onboarding process! Please provide us with the following documents:

- Copy of your W-9
- Copy of your Errors & Omissions Policy
- Copies of your agency's current and active licenses
- Copies of your DRLP's (Designated Responsible Licensed Producer/Agent in Charge) current and active licenses
- Agency Setup Form (linked in onboarding email)
 - Please complete all tabs:
 1. Agency Details tab - please complete the required fields
 2. Office Locations
 3. User List tab - this should include you and your team members who need access
 4. Account Management - Your agency's IVANS information if you wish to receive downloads
 5. Agency License tab - please provide State License numbers for the agency
 6. Designated Responsible Licensed Producer/Agent in Charge License numbers.
- MSI-ACH commission payment form (linked in onboarding email)

Company name*

First Name* Last Name*

Email Address*

shayna.oliver@msinga.com

Agreement Signature Contact*

Please enter name and email of who should be signing the agreement

Upload your W-9 document*

No file chosen

Upload your Errors and Omissions policy here*

No file chosen

Upload your agency's current and active licenses*

To upload multiple documents, please select all files at once from your computer. You won't be able to add more files later unless they are selected together.

No file chosen

Upload your DRLP's current and active licenses*

To upload multiple documents, please select all files at once from your computer. You won't be able to add more files later unless they are selected together.

No file chosen

Upload the Agency setup form *

No file chosen

Upload the MSI-ACH Commission Payment form*

No file chosen

Submit

Adding Product Access Ticket



Product Access Ticket

When access needs to be added to an active partner, a ticket needs to be opened through the company record, using the “Add new product/carrier” pipeline.

- A BDM Form link will be sent to your email to fill out
- Once the form is submitted, the Agency Services Team will take over the ticket and move it through the process

Product Access - BDM Form

PURPOSE

This form will be used for the BDM owner to request additional product access for the corresponding agency. Additional pages will become available based on the product access selected on first page.

TRIGGER PROPERTY

This form will be triggered by the “Add new product/carrier” ticket and will be sent to the Agency Services Team upon submission.

Provide the following information to add product access to an agency.

Agency name*

Main Contact - First Name* Main Contact - Last Name*

Email*

Product Access*

Admitted Product

E&S Product

Flood Product

Next

Yearly E&O Workflow Process



E&O Certificate Expiration Notice

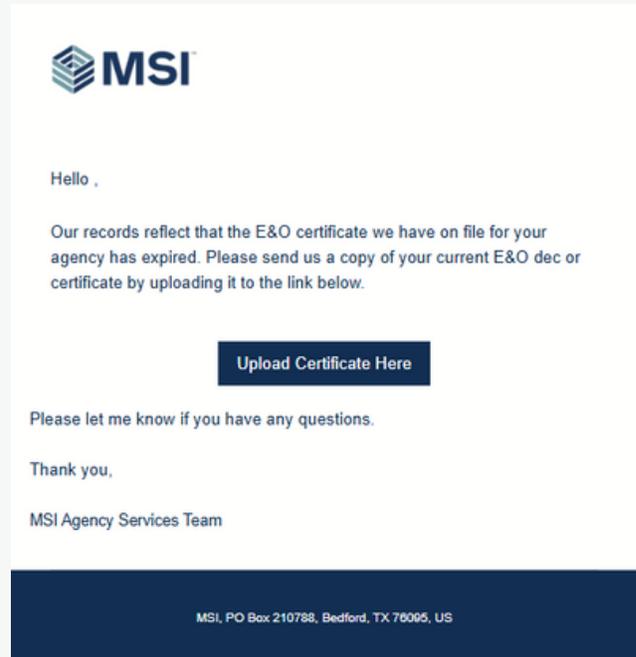
PURPOSE

This email is designed to notify the E&O contact on file 30 days after the agency's E&O certificate has expired. It will provide a link to a form where the updated certificate can be easily uploaded, ensuring our records remain accurate and up-to-date.

TRIGGER PROPERTY

The email is triggered when the E&O company property date is 30-days passed.

This email is set to send on an annual bases.



E&O Expiration Reminder Email

PURPOSE

This email serves as a follow-up reminder for the agency to submit their updated E&O certificate for our records. It will include the same form link provided in the previous email to simplify the submission process.

TRIGGER PROPERTY

The email is triggered 2-weeks after the initial email. It will only be sent out if the E&O contact has not submitted the form since the original email.



E&O Document Upload

PURPOSE

This form is for the E&O contact under each agency to upload their updated E&O documents.

TRIGGER PROPERTY

This form will be triggered by a workflow setup to send an email ANNUALLY, 30 days after the expiration date.

Upon submission, the E&O date on company records gets changed to the following year.

Please upload your current E&O dec or certificate below.

Company name*

E&O Documents*

No file chosen