

FORUM CREDIT UNION DIGITAL INSURANCE AGENCY SHATTERS INSURANCE SALES RECORD IN MARCH 2023

Through BUNDLE by Insuritas, FORUM Insurance Services was able to increase agency awareness and leverage digital automation to achieve record sales.

EAST WINDSOR, CT, USA, April 19, 2023 /EINPresswire.com/ -- Insuritas announces that FORUM



The most successful agencies are the result of close collaboration, active engagement, and partnership between the financial institution and the agency operation at BUNDLE by Insuritas. ”

Donna Jermer, EVP and CMO

Credit Union's insurance agency recorded its highest ever sales month in March 2023. Since August of 2021, Insuritas has launched and operated FORUM Insurance Services through its award-winning full-service digital insurance agency platform, BUNDLE by Insuritas. With this partnership, FORUM Credit Union offers its members the auto, home, and commercial insurance products they purchase every year, while deepening wallet share and building an important source of annuitizing non-interest income.

Donna Jermer, EVP & CMO at Insuritas noted, “This is an

excellent example demonstrating how the most successful agencies are the result of close collaboration, active engagement, and partnership between the financial institution and the agency operation at BUNDLE by Insuritas. It's a powerful confirmation that a credit union or bank can play the critical role of trusted insurance advisor to their customers for insurance purchases that 100% of their customers have to make every year.”

In this case, FORUM Credit Union's insurance agency was able to leverage Insuritas' digital insurance assistant, Lily, to identify high-intent leads using BUNDLE's suite of predictive analytics and advanced digital automation to drive interested members towards the agency to obtain an insurance quote on the communication channel of their preference.

Jermer continued, “As consumers continue to look for trusted platforms to shop and buy insurance through, financial institutions are rapidly emerging as the platform of choice where their customers can shop, compare, buy, and renew the insurance policies they need to protect themselves, their loved ones, and their most important assets. FORUM Credit Union's record sales in March is validation that with AI-powered, human-centric support from BUNDLE by

Insuritas, the right agency awareness strategies can be in place to allow customers to seriously consider their financial institution as a source for all their insurance needs.”

In analyzing exactly how FORUM Credit Union’s insurance agency achieved record sales, Insuritas has prepared a case study outlining the strategy, collaboration, and agency awareness tactics that were utilized through BUNDLE by Insuritas. To obtain a copy, please reach out to corporatesales@insuritas.com.

About Insuritas

Insuritas’ mission is to connect people to the insurance products they need through a seamless, transparent shopping experience in which carriers compete to provide them with the right coverage at the right price. Leveraging proprietary data-mining techniques and integrations through its BUNDLE brand, Insuritas offers a vast network of solutions to empower partners to operate their own labeled, full-service insurance agency. With Insuritas' data solutions, partners can generate expanded wallet share, increased retention, and recurring non-interest revenue. For more information, visit www.insuritas.com.

Jeffrey Chesky

Insuritas

+1 8606531134

[email us here](#)

Visit us on social media:

[Facebook](#)

[Twitter](#)

[LinkedIn](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/628880692>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2023 Newsmatics Inc. All Right Reserved.