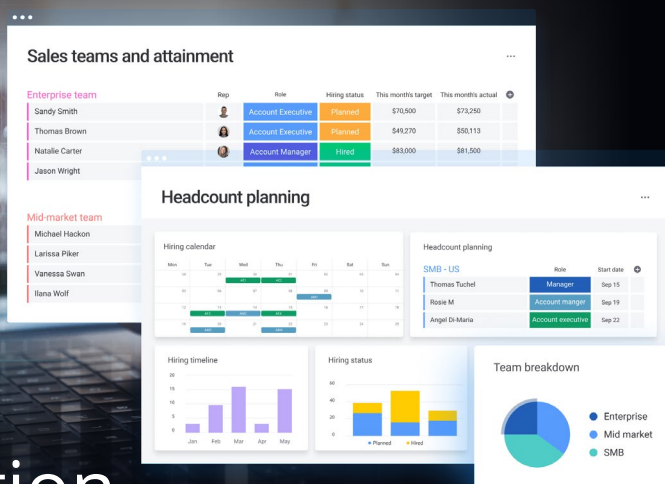




Sales Transformation

How Everything.Insure Increased Sales by 60% Using monday.com

THE CHALLENGE

For sales teams in insurance, speed and visibility are everything.

Before monday.com, brokers often had to navigate multiple systems to locate lead information, client data, and quote documentation.

The process created unnecessary administrative work and reduced selling time.

THE SOLUTION

Everything.Insure implemented a dedicated sales management environment within monday.com, providing:

- ✓ Centralized lead management
- ✓ Automated follow-up reminders
- ✓ Expiry date tracking
- ✓ Real-time pipeline visibility
- ✓ Integrated quote access
- ✓ Leadership reporting dashboards

RESULTS AT A GLANCE

60% Sales Growth

Since implementation, the business has experienced:

60% growth in sales performance.

Shorter Sales Cycle

7-day reduction in average sales lifecycle.

Faster Access to Client Information

Search times reduced from:

- 3 minutes
- To just 15 seconds

Longer Customer Retention

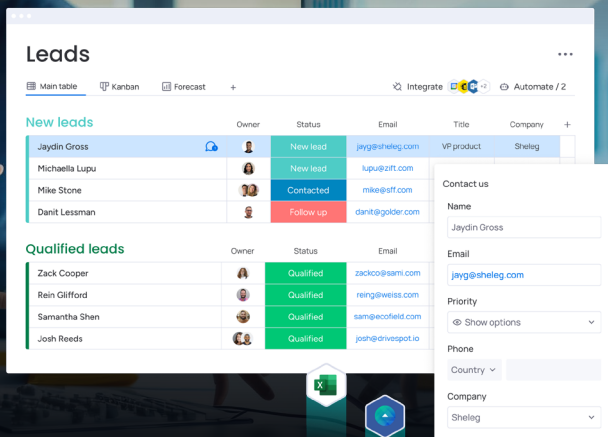
Client lifetime improved by 6 months.

LEADERSHIP PERSPECTIVE

"The sales team and sales managers now have full visibility of all leads and where they sit in the sales lifecycle. There is now full transparency and immediate reporting to KPIs."

KEY OUTCOME

Sales teams spend less time searching and more time selling.



PARTNER SPOTLIGHT: Why Everything.Insure Chose The CRM Team

Technology alone does not drive transformation. Successful adoption depends on having the right implementation and support partner.

For Everything.Insure, The CRM Team played a key role in ensuring ongoing support and optimization.

"To be honest, if I ever need anything, Jarad is always available. I recently added another group company to their own monday.com instance and it was immediately added to my profile so I could oversee everything. They are quick, efficient, and always willing to help."

PARTNERSHIP IMPACT

- Responsive support
- Rapid implementation assistance
- Ongoing optimization guidance
- Multi-company scalability
- Trusted strategic partnership

CLOSING RECOMMENDATION

"Just do it, you won't regret it. If you put in the effort to scope out your requirements correctly before implementation, you will save yourself a lot of time down the line as the system is extremely easy to use and setup."

Tyne van der Merwe

HEAD OF SALES AND DATA ANALYTICS

Everything.Insure