

Your Core Platform

Built for Connection. Powered by Integration.

Unite your entire operation — from policy management to partner integrations. Our constellation of tools powered by our robust AMS/CRM are your Operating System.

Future Driving Products

Build an ecosystem that drives growth in your business.



AGENCY MANAGEMENT & CRM

PulseConnect

A robust system designed for Carriers and Distributors. Provides seamless onboarding, case management, workflow automation, lead management, sales, built-in analytics and reporting.



PRESALES CONNECTION

PulseEcto1

Two-way embedded connection with Hexure's product suite.



DASHBOARD / PORTAL

Pulse360

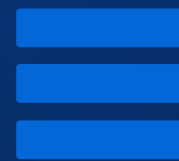
Agent facing portal with analytic insights, downline vision & visibility to business.



UNDERWRITING

PulseLife

Streamlined with automated risk assessment, evaluations and guideline integration.



COMMISSIONS

PulseState

Automate complex commission structures and payouts in complex Life & Annuity spaces.

Ready for the future? **Let's talk.**

Seeing is believing. Meet with our founders to see how Pulse Point can catalyze your productivity.

Request a Demo: [PulsePoint.ai](https://pulsepoint.ai)

 **Pulse Point**

pulsepointmanagement.com

+1 (833) 579-7764

AGENCY MANAGEMENT & CRM

PulseConnect

A robust system designed for Carriers and Distributors. Provides seamless onboarding, case management, workflow automation, lead management, sales, built-in analytics and reporting.



30%

Client Savings in One Year of Using PulseConnect

SEAMLESS INTEGRATION

Integrates with a growing list of the top industry vendors.

SureLC

Stateable

Hexure

Pulse Add-Ons

PACKAGES

Have confidence in a system that can scale with you.

	Basic Includes: Basic AMS/CRM and Analytics
	Choice Adds: PulseLIFE or PulseState
	Suite Adds: PulseLIFE, PulseState and PulseEcto1

PURPOSE

- ✓ Core AMS/CRM/PAS for the Insurance Services Industry
- ✓ Centralized platform for managing policies, agents, and workflows.

KEY FEATURES

- ✓ Policy Management
- ✓ Agent and Client CRM
- ✓ Workflow Automation
- ✓ Real-Time Analytics

WHY PULSE CONNECT?

- ✓ Comprehensive insurance-specific AMS/CRM
- ✓ Seamless integration with Top Industry vendors such as SureLC, Stateable, and Hexure
- ✓ Centralizes operations and streamlines sales workflows
- ✓ Fully domestic support team

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DASHBOARD / PORTAL

Pulse360

External agent facing portal for a streamlined experience with analytic insights, downline vision and visibility to business.



Ai-Driven Analytics

Out of the gate analytics and forecasting that actually impact your business.



REAL RESULTS

The smoothest major system change I've ever been involved in.

- Sam B. Principal, Vibe Insurance Services

PACKAGES

Have confidence in a system that can scale with you.

	Basic Includes: Dashboard
	Suite Adds: PulseEcto1, Agent CRM & Agent PulseLIFE

PURPOSE

- ✓ Empower agents with full visibility and control over their client interactions.

KEY FEATURES

- ✓ Customized agent CRM environment
- ✓ Real-time policy and workflow updates
- ✓ Integrated agent-level underwriting view

WHY PULSE 360?

- ✓ Streamlined agent experience
- ✓ Full operational transparency
- ✓ Integrated with PulseConnect and PulseLIFE
- ✓ Intuitive streamlined onboarding process

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UNDERWRITING

PulseLife

In-House underwriting platform streamlined with automated risk assessment, evaluations and guideline integration.

80%

Increased Placement Ratio
in Real Environments

SEAMLESS INTEGRATION

Integrated with Atidot, EIS and Hexure



Atidot



EIS



Hexure

REAL RESULTS

Genuine investment in our success.

"They didn't just transfer our data; they organized it, cleaned it up, and set us up with better workflows that actually make our day-to-day easier. Our team was trained so well that we were fully up and running from the very first day. The level of communication, follow-up, and genuine investment in our success is something we've never experienced from any other vendor."

- Mac C., Managing Partner, Gen3



PURPOSE

- ✓ Streamlined life insurance underwriting operations.

KEY FEATURES

- ✓ Risk Assessment Automation
- ✓ Rule-Driven Evaluations
- ✓ Guideline Integration

WHY PULSE LIFE?

- ✓ Accelerates underwriting turnaround
- ✓ Seamless integration with PulseConnect and agent platforms
- ✓ Simplifies risk evaluations
- ✓ Increased placement ratios of 80% and up, when tested in real environments

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PRESALES CONNECTION

PulseEcto1

Our first of its kind direct connection to Hexure's product suite, PulseEcto1 enables a two-way integration for FireLight, quoting, and inforce service documents. This solution enhances operational efficiency by streamlining workflows and improving service delivery. Giving your firm the edge on book regeneration and NIGO avoidance.

Direct Connection to **hexure**

Revolutionize how your team handles applications, policy management, and client data—all within a unified experience.

TWO-WAY EMBEDDED INTEGRATION

Two-way embedded integration with PulseConnect, enabling real-time data sync and intelligent workflow automation.

SMARTER, FASTER APPLICATION PROCESSING

Auto-populate and push client information directly into FireLight from PulseConnect—no double entry, no wasted time.

AUTOMATED CASE CREATION & OPPORTUNITY TRACKING

Auto-generate cases in PulseConnect. Submitted applications from FireLight automatically feed into PulseConnect, initiating cases without manual setup.

ILLUSTRATIONS & QUOTES AS OPPORTUNITIES

Instantly save quotes and illustrations into PulseConnect as Opportunities, making it easier to track and convert.

SEAMLESS INTEGRATION

Embedded integration with Hexure built with plug in capability for top industry vendors such as Surancebay



PURPOSE

- ✓ Enhance operational efficiency by streamlining workflows and improving service delivery

KEY FEATURES

- ✓ Sales Management
- ✓ New Business Processing
- ✓ Two-way integration for FireLight, quoting, and inforce service documents

WHY CHOOSE PULSE ECTO1?

- ✓ Reduce manual data entry
- ✓ Accelerate turnaround time
- ✓ Eliminate errors
- ✓ Centralize opportunity management
- ✓ Empower your advisors with seamless tools

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COMMISSIONS

PulseState

Automate complex commission structures and payouts in the complexity of the Life and Annuities industry.



Compliance Automation

Designed to simplify complex scenarios in Life and Annuity spaces.

SEAMLESS INTEGRATION

Embedded integration with Stateable



REAL RESULTS

Allows us to keep pace with the growing demands of scaling.

“As the head of a burgeoning BGA, it had become apparent that our tech and infrastructure needed significant upgrades to keep pace with the growing demands of scaling. I was vetting all the usual suspects when someone suggested I speak with PulsePoint. They blew us out of the water with their capabilities. We look forward to a long relationship them.”

- Brandon U., President, Fortis Brokerage Services

PURPOSE

- ✓ Automate complex commission structures and payouts
- ✓ Add-on rules-based commission net calculation

KEY FEATURES

- ✓ Hierarchical commission processing
- ✓ Special deal calculations
- ✓ Seamless integration with PulseConnect

WHY PULSE STATE?

- ✓ Eliminate manual commission errors
- ✓ Streamline complex payout structures
- ✓ Adaptable to industry-specific compensation models

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