

\$70k+ in First-Year Savings with PulseConnect

PulseConnect is Pulse Point's core platform. A robust system designed for Carriers and Distributors. Provides seamless onboarding, case management, workflow automation, lead management, sales, built-in analytics and reporting.



AGENCY PROFILE

Type: Mid-sized Life & Annuity agency

Staff: 12 team members (5 advisors, 4 case managers, 3 admin/support)

Previous Systems: Agency Integrator + Hubspot + multiple third-party tools (e-sign, scheduling, workflow, reporting)

Annual Revenue: ~\$3.5M

THE CHALLENGES BEFORE PULSE

Multiple Systems Costs:

Paid for five different platforms to manage CRM, case tracking, commissions, scheduling, and document signing

Total annual licensing & subscription fees: **\$42,000**

Inefficient Workflows:

Case managers were re-keying the same data into multiple systems, losing ~15 hours per week across the team

Advisor onboarding and case processing took 30–40% longer than necessary

Manual Reporting and Compliance:

Commission tracking, pipeline reports, and compliance documents required hours of manual updates each month

Errors often led to rework and missed deadlines

WHAT CHANGED AFTER PULSE

All-in-One Chassis:

Replaced all five separate tools with one integrated system, instantly eliminating **\$34,000** in software costs

Automated Workflows:

PulseConnect's smart forms, dynamic mapping, and automated case status updates reduced redundant data entry by 80%

Time saved: ~700 staff hours/year = **\$28,000** in labor cost savings

Built in Commission and Compliance Tracking:

Commission grids, NIGO detection, and compliance reporting automated inside the CRM — no extra tools or manual compiling

Reduced errors and eliminated ~100 hours/year of rework = **\$8,000** in cost avoidance

FIRST YEAR IMPACT

Total Hard Savings:

Software & licensing elimination: **\$34,000**

Labor efficiency gains: **\$28,000**

Rework/error cost avoidance: **\$8,000**

Total First-Year Savings **\$70k+**

Plus: Faster turnaround times, happier advisors, and a smoother client experience.