



The pipeline you control doesn't come from referrals.

It comes from a system you build and run *by design*.

Insurance sales pipelines usually run on referral networks that take a decade to grow, association groups that are highly competitive, and inconsistent cold outreach. It works, until it doesn't, and you're left scrambling for new ways to show up. What's missing is structure. A way to find the right prospects, design messages that earn a reply, and run a sequence at scale your team can actually sustain. Not cold-calling. Not blasting. *A deliberate pursuit.*

Developed and tested for over a decade, *Pipeline Growth* is the B2B outreach framework used by the most successful insurance sales teams to turn cold leads into hot prospects, increase close ratios, and boost client retention.

THE PIPELINE GROWTH TRAINING

i.

Boost close ratios

Prospects arrive familiar with your firm, your people, and your value proposition. By the time the producer picks up the phone, your name is already in their head.

ii.

Strengthen retention

Clients hear from you between renewals, building real relationship through expertise, care, and interest. The book stops feeling like a target every twelve months.

iii.

Sharpen forecasts

By mid-October you know what's closing by year-end, not the week before. Pipeline becomes a credible revenue projection, a tool for coaching producers, and a competency the firm owns.

iv.

Scale production

New producers run a documented motion from day one, with results to show for it. Senior producers enter new verticals and regions without rebuilding a network.

RESULTS FROM THE FIELD

\$800K+

PIPELINE BUILT
IN 2 MONTHS

65%

ENGAGEMENT
RATE

\$150K

REVENUE IN
FIRST SIX MONTHS

Production isn't a sales problem. It's a *pipeline* problem.



Generate revenue without a referral network. Three pipelines, one for each stage of the deal: cold lead, warm prospect, retained client. Together they compound into a brokerage asset.



COLD SALES PIPELINE

A coordinated campaign aimed at a researched list of leads. Fed with new leads, the pipeline runs on autopilot until a renewal date or response is recorded.



RENEWAL SALES PIPELINE

With a renewal date in hand, a lead becomes a prospect. Outreach begins 100 days out, builds to a deliberate crescendo across the 50-to-30 day window, engaging prospects at the right time, with the right message, then tapers into the renewal date itself.



CLIENT ENGAGEMENT PIPELINE

The work that begins the day the policy binds. Outreach such as year-end notes, claims debriefs, subject-matter updates, or the occasional check-in. The kind of contact that costs nothing, earns a stronger relationship, and strengthens client retention.

COLD SALES PIPELINE TRAINING

Learn it once. *Scale production year over year.*

Half-day intensive, online (or in-person on availability). Walk out with the framework, the cadence, and the playbook to build and run a working cold sales pipeline.

\$895 /seat

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