FIRST CONNECT

Customer Journey

Sales and Support Journey

The First Connect customer journey is designed to guide agencies from initial interest all the way through long-term strategic partnership. Each stage includes a dedicated team, clear handoffs, and focused support to help agencies grow their business through the First Connect platform.

1. Marketing → Lead Generation

Our Marketing team identifies, attracts, and engages potential agency partners. Through targeted campaigns, educational content, and strategic outreach, we generate interest in the First Connect platform and its value for independent insurance agencies. Once an agency expresses interest, they're ready for the next step in the journey.

2. Day 0 → Sign Up Team

When a lead signals interest, the Sign Up Team reaches out to learn more about the agency's business model, goals, and operational needs. Their primary objective is to understand whether the First Connect platform is a strong fit and to help the agency begin the enrollment process. When an agency decides to move forward, they transition into onboarding.

Key Responsibilities:

- Explain platform value and key features
- Understand agency workflows and appointment needs
- Convert interested leads into active First Connect users

3. Days 1–60 → Onboarding Team

Once an agency joins First Connect, they are assigned a dedicated Onboarding Account Manager for their first 60 days. This period is focused on enabling the agency to successfully navigate the portal, submit business, and begin generating revenue. Achieving a Fast Start is an important milestone. Once reached, the agency enters the next stage of support.

During the first 60 days, the Onboarding AM:

- Guides the agency through portal setup and platform navigation
- Ensures they obtain access to the appointments needed to serve their customers
- Provides hands-on support to help them begin submitting business
- Drives toward their first submitted policy, with a focus on achieving a Fast Start policy

4. Days 60–120 → Success Team

At day 60, the relationship transitions to a Success Account Manager, who continues to build on the foundation set during onboarding. Agencies who have written a policy and reported a Fast Start earn their way into spending time with the Success Team. The goal during this stage is to help agencies grow from initial production to consistent, diversified performance.

The Success Team's Role:

- Support agencies who have been actively selling from day 60 to 120.
- Drive deeper adoption across more carriers
- Help agencies optimize quoting and submission workflows
- Identify opportunities to expand the agency's business on the platform

5. 120+ Days → Strategic Team

After 120 days, agencies who are outperforming their peers or demonstrating high growth potential may be identified as Strategic Accounts. These agencies are assigned a Strategic Account Manager, who becomes their dedicated point of contact moving forward as they earn and maintain Rewards Program status. This stage reflects an agency's maturity and performance within the First Connect ecosystem.

Strategic AM Responsibilities:

- Provide long-term, consultative support
- Help agencies further diversify their book across a broader set of carriers
- Offer guidance on complex workflows, optimization, and scaling
- Support agencies that typically qualify for tiered rewards status (Silver, Gold, etc.)
- Manage territory-based portfolios of high-producing agencies

6. Support Team & Agency Ops

Throughout the entire lifecycle, the Support Team and Agency Operations Team partner with Sales, Onboarding, Success, and Strategic teams. Their role is to ensure agencies receive consistent, reliable service and to help resolve operational issues that arise.

They serve as an essential backbone for:

- Platform troubleshooting
- Appointment status and carrier access
- Operational questions
- Process support and escalations