AI Business OS

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Cross-sell and upsell identification

This workflow automatically identifies cross-sell and upsell opportunities by analyzing client data and policy gaps, then generates personalized recommendations for agents to increase revenue per customer.

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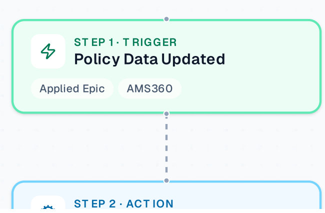
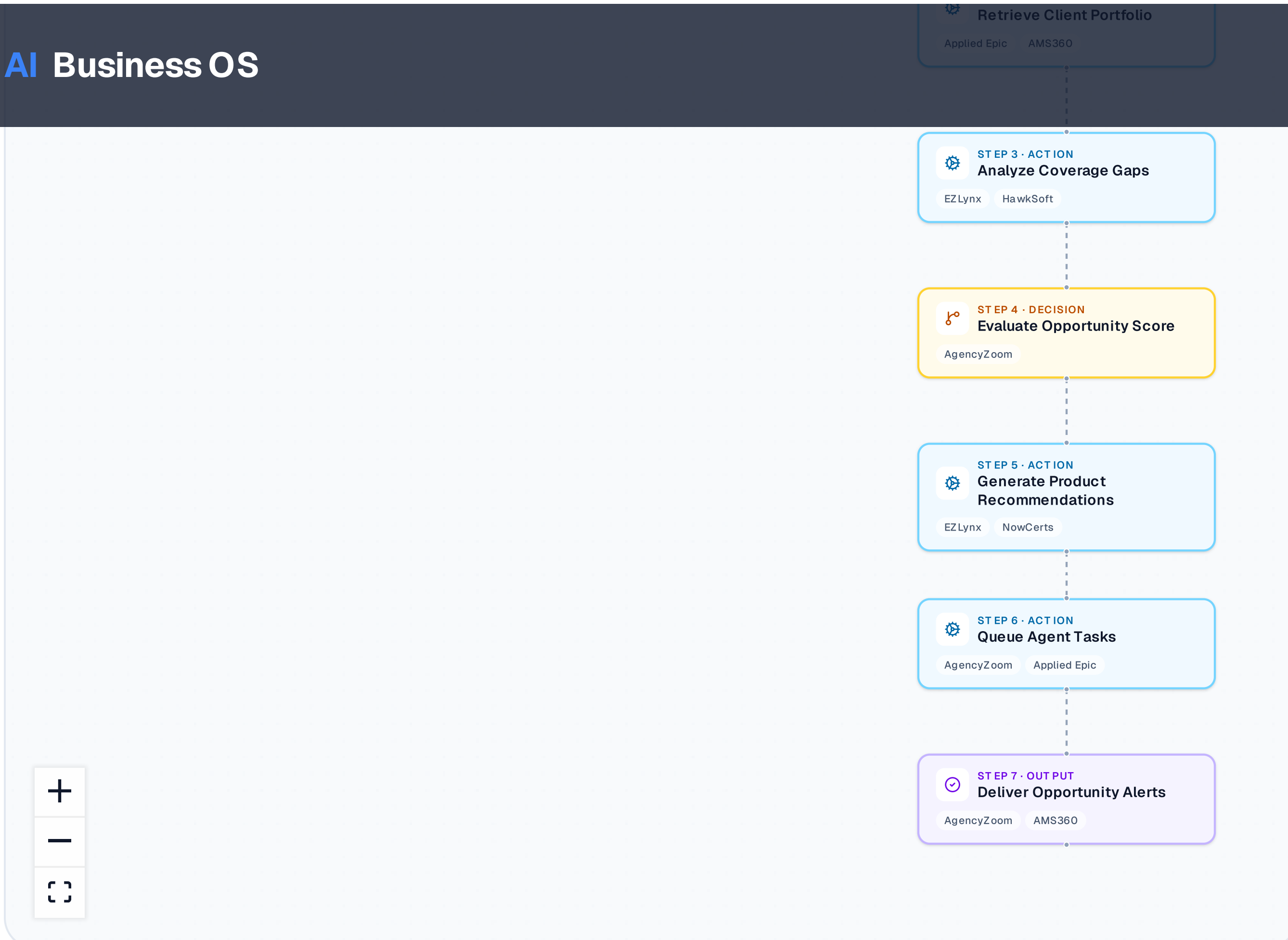
WORKFLOW TRIGGER

Client policy data is updated or renewal period begins (30-60 days before expiration)

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

TRIGGER

Policy Data Updated

Client policy information is modified or renewal timeline is triggered in the agency management system. This initiates the cross-sell analysis process.

Applied Epic · AMS360

2

ACTION

Retrieve Client Portfolio

Pull complete client information including current policies, coverage limits, claims history, and demographic data. Compile comprehensive client profile for analysis.

Applied Epic · AMS360

3

ACTION

Analyze Coverage Gaps

Compare current policies against industry standards and client risk profile to identify missing coverage types and underinsured areas. Generate gap analysis report.

EZLynx · HawkSoft

4

DECISION

Evaluate Opportunity Score

Calculate opportunity score based on coverage gaps, client value, and purchasing probability. Determine if opportunities meet threshold for agent follow-up.

AgencyZoom

5

ACTION

Generate Product Recommendations

Create specific product recommendations with estimated premiums and coverage details for identified opportunities. Prioritize recommendations by revenue potential and client need.

EZLynx NowCerts

6

ACTION

Queue Agent Tasks

Create follow-up tasks for agents with client contact information, recommended talking points, and proposed quotes. Schedule outreach based on client preferences and agent availability.

AgencyZoom Applied Epic

7

OUTPUT

Deliver Opportunity Alerts

Send prioritized opportunity notifications to agents with client summaries and recommended actions. Update client records with opportunity tracking status.

Outputs

- Prioritized cross-sell opportunity list
- Automated agent task assignments
- Client gap analysis reports
- Revenue opportunity forecasts

Key Metrics

- Cross-sell conversion rate
- Revenue per client increase
- Opportunity identification accuracy
- Agent follow-up completion rate

Tools & Integrations

- Applied Epic
- AMS360
- EZLynx

- HawkSoft
- AgencyZoom
- NowCerts

LinkedIn

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