pathway

Improving Efficiency and Client Experience with Intelligent Insurance Marketing Automation

ei edwards insurance brokers

Time Saved per Month	Manual Work Across Team	Time Saved per Client
10+ hrs	**Significantly Reduced**	**5 min** Through Automation

Edwards Insurance Brokers

At Edwards Insurance Brokers, the focus has always been on delivering exceptional service and building long-term relationships with clients across a wide range of commercial and personal insurance needs. As the business continued to grow, the team looked for ways to streamline time-consuming tasks and improve the consistency of client communication, without compromising on quality.

Integrating PathwayPort into their workflows has enabled Edwards Insurance Brokers to enhance operational efficiency, improve client engagement, and free up internal resources for more strategic, value-driven work.

The Challenge: Manual Processes Draining Time and Resources

At **Edwards Insurance Brokers**, key operational tasks—such as sending pre-renewal and payment reminder emails—were entirely manual. These essential communications consumed significant monthly staff time, adding to an already heavy administrative burden. Pre-renewal reminders alone accounted for over 10 hours of manual work each month, and payment reminders took around five minutes per client, placing additional strain on the accounts team.

The time spent on these repetitive tasks was preventing the team from focusing on more strategic, client-centric work.

The Solution: Automating Core Workflows with PathwayPort

PathwayPort offered an immediate solution by automating these labour-intensive processes through its seamless integration with Acturis. With automation in place, tasks like pre-renewal and payment reminders are now triggered automatically—completely removing the need for manual input. As a result, the team has reclaimed hours of productive time and seen notable improvements in payment timeliness and debtor management.

> "We saved over 10 hours a month—just like that. Automated payment reminders used to take us five minutes per client. Now they go out instantly—and our aged debtor list has never looked better."
>
> — Becky Goodfellow, Operations and Marketing Executive, Edwards Insurance Brokers

The Challenge: Inconsistent Client Communication and Feedback Loops

Maintaining strong client relationships was a top priority, but manual communication made it difficult to ensure consistent touchpoints. Without structured feedback mechanisms in place, it was challenging to gather timely insights into client experiences—and even harder to act on them quickly.

The Solution: Strengthening Engagement with Automated Feedback Workflows

With PathwayPort, Edwards implemented automated workflows to send NPS surveys and client feedback questionnaires. The system alerts the team as soon as a client submits feedback, enabling fast, meaningful follow-ups. This level of responsiveness has helped improve client satisfaction and reinforce loyalty.

> "Client feedback hits our inbox in real time—and we act fast. With automated NPS surveys and instant alerts when a client responds, we're more in tune with our clients than ever before. It's helped us turn feedback into action—and loyalty."
>
> — Becky Goodfellow, Operations and Marketing Executive, Edwards Insurance Brokers

The Challenge: Managing Up-to-Date, Growing Client Data

Maintaining accurate and current client data is essential for delivering timely, relevant communications. With a growing client base and an increasing number of digital touchpoints, Edwards Insurance Brokers sought a more streamlined approach to ensure contact details remained complete and up to date—while also supporting evolving compliance requirements.

The Solution: Smarter Data Syncing and Personalised Consent Management

PathwayPort's daily two-way sync ensures that client data remains accurate and aligned across systems. The team is automatically notified of bounced emails or missing contact details, enabling proactive updates to maintain communication continuity. Additionally, automated workflows for collecting marketing consent preferences have made it easier to personalise communications and ensure compliance with each client's preferences.

The Challenge: Limited Capacity to Focus on Growth Initiatives

Manual processes were tying up internal resources, limiting the team's ability to pursue new business opportunities or re-engage lapsed clients. There was a clear need to free up capacity and gain better visibility into key metrics such as aged debtors.

The Solution: Strategic Insurance Automation for Smart Scaling

With PathwayPort, Edwards Insurance Brokers has been able to unlock internal capacity and shift focus towards business development and retention strategies. Automation has enhanced financial oversight and enabled more agile responses to client needs, creating a more scalable and growth-ready operation.

"Manual tasks? Practically eliminated. From payment reminders to follow-ups, we've automated dozens of repetitive tasks. It's reduced risk, improved consistency, and made our workflows smoother than ever."

— Becky Goodfellow, Operations and Marketing Executive, Edwards Insurance Brokers

Conclusion

By identifying and addressing key operational pain points, Edwards Insurance Brokers has transformed its internal workflows and client communication through PathwayPort. From reducing administrative workload to enhancing data accuracy and client engagement, the firm now runs more efficiently and effectively—with automation as a central driver of their continued success.

About Pathway

Pathway is a cutting-edge automation platform that streamlines insurance operations by reducing administrative tasks, improving client engagement, and enhancing efficiency. With seamless integration into major BMS/AMS platforms such as Acturis, SIG, Power Broker, Applied Epic, and others, it enables brokerages and insurance agencies to focus on growth, customer retention, and delivering exceptional service.

Ready to Transform Your Business?

Discover how Pathway can revolutionise your operations.

BOOK A DEMO WITH PATHWAY TODAY

Learn more about Edwards Insurance Brokers