

Included with Marketing Automation

SMS Text Messaging

Automate Client Outreach with SMS Text Messages

Boost your client outreach with PathwayPort's **SMS texting feature**. Designed for brokers and insurance agents, this feature enables seamless communication through automated and direct messaging. Strengthen client relationships, enhance lead generation, improve customer service, and accelerate sales growth with this powerful tool.

How It Benefits Your Brokerage

Automated SMS in Workflows:

Easily add SMS as a fallback step for failed email deliveries to ensure your message gets through.

1-to-1 SMS Communication:

Initiate direct conversations with clients using the SMS Chat interface in your Pathway account.

Customizable Messaging:

Use merge tags for personalization to enhance your SMS content, such as including outstanding balances or conditional coverage information.

Multiple Phone Numbers:

Assign specific phone numbers to staff members.

How to Get Started:

- Seamlessly integrate SMS into your PathwayPort workflow and Broker Management System (BMS).
- Track undelivered messages, notify your team, assign staff to manage communications, and view all messages and conversations.
- Customize SMS with topics, documents, and personalized details, just like emails.

Streamlined Transcripts:

Automatically group and sync all SMS Chat transcripts to Activities in your BMS (Broker Management System).

Increase Customer Retention:

Send the right messages at the right time with eDelivery links, enabling clients to easily access the documents they need.

Reports:

Gain visibility into SMS delivery, open rates, and more analytics through PathwayPort's comprehensive dashboard.



Upgrade your communication strategy and keep clients informed wherever they are.
SMS is the perfect addition to your PathwayPort toolkit!

Key Benefits of Using PathwayPort's SMS Text Messages

Real-Time Updates:

Provide instant alerts and updates to clients, ensuring seamless and enhanced communication.

Customer Support:

Deliver responsive and efficient customer service by addressing queries and providing real-time claim status updates.

Streamlined Workflows:

Integrate seamlessly with your CRM and BMS to automate and optimize operational processes.

Lead Nurturing:

Utilize SMS marketing to effectively engage prospects and create new sales opportunities.

Drive More Revenue:

Simplify client communication by meeting them where they are, fostering stronger relationships, and driving sales growth.

Why Choose Pathway?

Pathway delivers cutting-edge insurance automation tools tailored for progressive agencies in the United States, Canada, and the UK. Anticipating industry trends and responding to evolving client needs, our intuitive cloud-based software is designed to propel medium to enterprise - sized brokerages to success.

Start for FREE:



Each account includes **500 free SMS** per month and a free local phone number. Additional numbers are just \$5/month, and extra messages cost \$0.015 each (CAD).

96%

Proven Success Rate

Use SMS as a fallback for your emails, with a high delivery success rate

3-6%

Client Retention Growth

Increase retention rates by an average of **3-6%** year over year.

18%

New Client Growth

Drive an average of **18%** growth in new clients with streamlined communication tools.

PathwayPort's SMS feature revolutionizes client communication, making it an essential tool for insurance agencies and brokers to stay competitive and drive growth.

Get PathwayPort Marketing Automation Today and Transform Your Outreach Strategy!

[Learn more](#)

Book a Demo

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