

CASE STUDY



Reducing Administrative Load, Improving Renewals, and Driving 200+ Google Reviews

5.5+ years

Using PathwayPort

200+ Google reviews

From ~2, with a 4.9 ★ rating

Activities auto-synced

Into SIG

Fast Insurance

Manitoba-Based Insurance Brokerage

Fast Insurance is an independent brokerage operating in Manitoba. When Ryan Martens acquired the business, one of his first operational decisions was to implement PathwayPort, based on his prior experience using the platform successfully in other brokerages.

Initially adopted to solve document delivery challenges, PathwayPort has since become a core operational and marketing layer - supporting renewals, retention, client communication, feedback collection, and self-service access.



PathwayPort became a major part of how we deliver documents, handle renewals, and stay in touch with clients.

— **Ryan Martens**, Owner of Fast Insurance

Improving Operational Efficiency

PathwayPort was introduced to reduce administrative workload while maintaining high service standards. As carriers transitioned to paperless operations, Fast Insurance faced rising document-handling responsibilities without a scalable way to manage them.

Automating document delivery through PathwayPort eliminated printing and mailing tasks entirely. Incoming policy documents now trigger automated workflows that deliver documents digitally to clients - saving time, reducing costs, and improving consistency.

This shift alone freed up hours each week per staff member, allowing the team to focus on higher-value work such as client conversations and policy optimization.

When carriers went paperless, the workload didn't disappear - it shifted to the brokerage. Pathway solved the problem of getting documents to clients quickly without absorbing the paper and mailing costs ourselves.

Enhancing Client Experience and Retention

Proactive Pre-Renewal Communication

Fast Insurance implemented automated pre-renewal questionnaires approximately 75 days before renewal. These questionnaires prompt clients to review changes made during the year, identify missed discounts, and confirm household or property updates.

By shifting this conversation earlier in the renewal cycle, the team now enters renewals fully informed, reducing back-and-forth, delays, and last-minute adjustments.

Prior to automation, renewal information was often collected late in the process. With PathwayPort, information arrives weeks in advance, enabling smoother, more accurate renewals.

By the time we sit down to work on a renewal, everything is already there. We've collected the information weeks in advance, sent the documents, and we're just fine-tuning instead of scrambling.

Client Self-Service and Engagement

Secure Client Portal (Self-Service Kiosk)

Fast Insurance deployed PathwayPort's Client Portal as a secure, always-available location for policy documents. Despite initial skepticism, client adoption exceeded expectations.

The simplicity of the portal, no passwords, access via email, has driven consistent usage and reduced inbound document requests.

I didn't think clients would use the portal, but adoption has been surprisingly strong. The simplicity makes all the difference.



Streamlining Data and Workflow Management

Two-Way Integration with Vertafore SIG

PathwayPort integrates directly with Vertafore SIG, creating a seamless operational workflow. The integration enables:

- Automated workflows triggered by policy activity
- Extraction of key policy data such as coverage limits
- Automatic logging of completed questionnaires and activities back into SIG

Fast Insurance follows a controlled rollout approach - validating workflows manually before transitioning them into full automation - to ensure accuracy and team confidence. This process, supported by the PathwayPort team, allows workflows to be thoughtfully designed, tested, and tailored to Fast Insurance's specific operational needs. As a result, duplicate data entry has been eliminated and the brokerage has gained clear visibility into client engagement, including email opens, clicks, and response history.

Driving Growth Through Feedback and Reviews

Fast Insurance uses PathwayPort's NPS workflows to collect client feedback after:

- New business is written
- Renewals are completed

We had two Google reviews when I bought the brokerage. Now we're over 215, and people tell us they chose us because of the reviews.



Business Impact

PathwayPort helped Fast Insurance deliver measurable improvements across operations, client experience, and growth:

- Hours saved weekly per staff member
- High completion rates on early renewal questionnaires
- All activity automatically documented in SIG
- Full engagement visibility across client communications
- Google reviews increased from ~2 to 200+
- Increased inbound leads driven by strong online reputation
- Successful targeted cross-sell campaigns, particularly for boat policies
- Consistent client engagement through 1–2 newsletters per year

Supporting Long-Term Growth and Scalability

With administrative tasks automated, Fast Insurance has established a strong foundation for scalable growth. The brokerage is now expanding its use of rules-based automation, incorporating deeper segmentation and branching logic to further refine workflows.

Fast Insurance continuously evolves its automation to grow in step with the business.

Conclusion

PathwayPort has enabled Fast Insurance to reduce administrative burden, improve renewal accuracy, enhance client engagement, and generate sustained growth. By automating low-value tasks and strengthening communication throughout the policy lifecycle, Fast Insurance has positioned itself for long-term success in a competitive market.

About PathwayPort

PathwayPort is an insurance-native automation platform built to reduce administrative workload, improve client engagement, and increase operational efficiency. With deep, two-way integrations into leading BMS and AMS platforms, including Acturis, Vertafore SIG, Power Broker, and Applied Epic, PathwayPort helps insurance agencies and brokerages automate everyday workflows so teams can focus on growth, retention, and delivering exceptional service.

Ready to scale your brokerage?

Discover how PathwayPort can modernize your operations and streamline client communication.

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[Learn more about Fast Insurance](#)