



### Sales Automation

From the inception of a lead, BluInsurance's sales automation uses industry best practices to define frequency and method of lead engagement. BluInsurance then engages the sales workforce with reminders and scripts to promptly engage a lead. BluInsurance sales automation will also automatically send follow up emails with every interaction.



**Visit us at:**  
bluroot.ca

**Contact Information:**  
Massimo Ianniruberto, President  
mianniruberto@bluroot.co  
1 800-418-8120 x 1

**Tom Hall, Product Manager**  
thall@bluroot.co  
1 800-418-8120 x 3

**Customer Service**  
customer@bluroot.co

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Received By	Subject
 mianniruberto@bluroot.co	Checking In
 mianniruberto@bluroot.co	Following Up


### Retention Automation

BluInsurance's retention automation module analyzes all upcoming policy renewals and intuitively begins customer engagement. The retention module automatically sends a series of emails based on industry-best cadences. BluInsurance personalizes these emails using pre-populated data fields from your CRM.

←  Kikelia Castillon Policy - \$ 1,500.00

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Policy Owner: Massimo Ianniruberto  
Stage: Closed  
Closing Date: Jan 5, 2018

Stage:  Closed

CONTACT PERSON:  Kikelia Castillon  
kcastillonrg123432@yellowpages.com

NEXT ACTION:  Follow Up