

## Prospect. Renew. Retain.

CRM built for insurance and financial advisory teams.

SOC 2 Type II Certified

# Never Miss a Renewal. Never Lose a Client.

LIC agents, IRDA-licensed advisors, and mutual fund distributors use HelloGrowthCRM to track their policy portfolios, automate renewal reminders, and manage referral pipelines — all from their phone. Rs. 899/user/month.

LIC / Life Insurance Agents

IRDA General Insurance

Mutual Fund Distributors

Wealth Management Firms

Health Insurance Brokers

01

### Policy Renewal Reminders

Automatically send WhatsApp renewal reminders 90, 60, 30, and 7 days before policy expiry. Track which clients renewed and which need a follow-up call.

✓ Zero lapsed policies

02

### Client Portfolio View

See every client's complete insurance and investment portfolio in one view — policies, maturity dates, SIP amounts, and next review date.

✓ Full client picture

03

### Referral Pipeline Management

Track referrals from existing clients — who referred whom, what stage they're at, and how much commission is in the pipeline.

✓ Referrals never lost

#### WHAT'S INCLUDED

- ✓ Policy renewal auto-reminders
- ✓ Client portfolio management
- ✓ Referral pipeline tracking
- ✓ SIP / investment milestone alerts
- ✓ Annual review scheduling
- ✓ Lead source attribution

**Rs. 899**

per user / month — all features included

No per-client charge. DPDP-compliant.

### RENEWAL REMINDER WORKFLOW

- 01

**Policy imported**

Upload your client policy data via CSV or connect your agency portal.
- 02

**Renewal calendar auto-built**

CRM calculates renewal dates and builds a 12-month reminder calendar.
- 03

**90-day WhatsApp sent**

Client gets a friendly WhatsApp: 'Your [policy name] renews in 90 days.'
- 04

**30-day + call trigger**

At 30 days: WhatsApp reminder + agent gets a call task in CRM.
- 05

**7-day urgent follow-up**

Auto-WhatsApp with payment link or agent call scheduled.
- 06

**Renewal confirmed**

Policy renewed. CRM updates. New renewal date set automatically.

### WHAT YOU TRACK PER CLIENT

- All active policies (life/health/general)
- Last contact date & channel
- Premium amounts & due dates
- Referrals given
- Nominee details
- Commission earned
- KYC document status
- Annual review date
- SIP / investment portfolio
- NPS / satisfaction score

### FINANCIAL ADVISOR USE CASES

- Mutual fund SIP renewal and top-up reminders
- Annual portfolio review scheduling
- Health insurance renewal before April (tax season)
- ULIP maturity date alerts
- Tax-saving investment season (Jan-Mar) campaigns
- Client birthday + anniversary WhatsApp (relationship)

### FREE CRM SETUP FOR INSURANCE TEAMS

We import your existing client policy list, set up renewal reminder automations, and configure your WhatsApp integration — in 48 hours. Start your renewal season with full automation.

[sales@hellogrowthcrm.com](mailto:sales@hellogrowthcrm.com)

[Book Setup Call](#)

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DPDPA & IRDA DATA COMPLIANCE