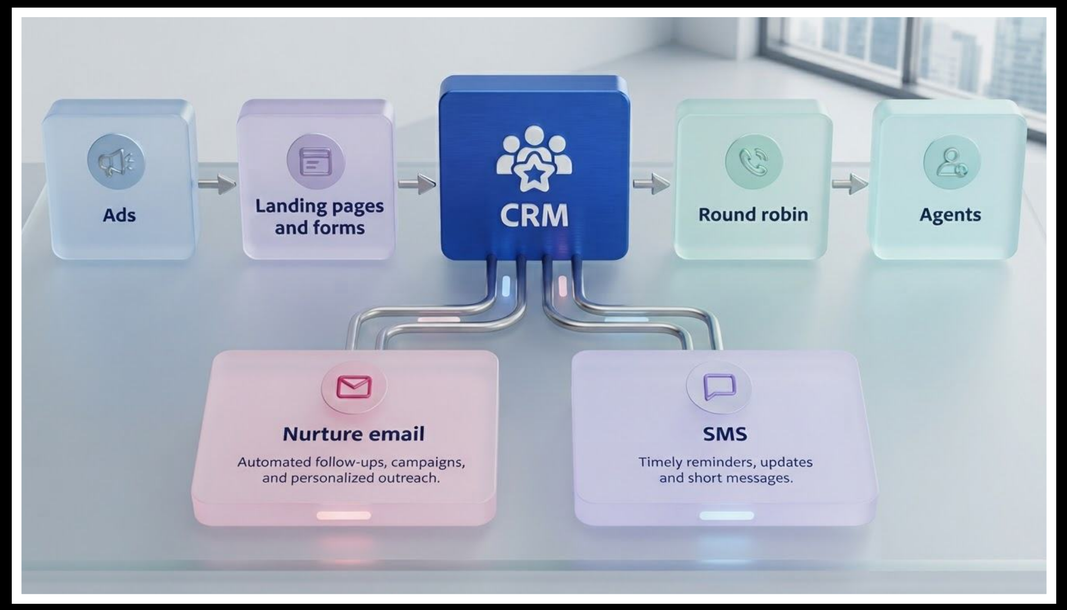
CASE STUDY:

One Integrated Lead System as a Catalyst for Growth

A companion to "Sorting the Work: What to Automate, What to Enhance, and What to Protect"



Executive Overview

In "Sorting the Work," we suggested a simple exercise: pick one process, sort it into three buckets (automate, enhance, protect), and start there.

Here's what that looked like on a real system.

A growing life insurance agency had a CRM and a team of licensed agents. What they needed was a steady flow of leads, and a fair, automatic way to get each one to the right agent.

Apis built it as one integrated system. Facebook ads drive prospects to landing pages and lead forms. Every lead flows straight into the CRM and is assigned round-robin to an agent. Nurture emails, SMS campaigns, and a set of in-CRM workflows keep leads moving through the pipeline.

At its peak, Apis's ads were generating 500 leads a week at $9-$12 cost per lead.

The system did what it was built to do. It also taught us the most useful lesson in this story:

Automation and ads bring in volume and speed, but whether a lead turns into a sale depends on what happens next.

CASE STUDY: ONE INTEGRATED LEAD SYSTEM AS A CATALYST FOR GROWTH

Project Background

The agency already had a CRM in place. Their ask was simple: **get us leads, and round-robin those leads to our agents.**

What started as a website project grew into something bigger. Over time, Apis became the agency's marketing and technology team: running the ads, building the landing pages, integrating the tools, and maintaining the automations that tied everything together.

We started where we always start: with a list of needs and a few questions.

The result: a more distinctive story, a more intuitive digital experience, and a foundation for growth built around one simple promise: **Making Life Easier.**

- Where will leads come from, and where does each one need to go?
- How do we share leads fairly across the agent team?
- What happens to a lead nobody has contacted yet?
- Which steps need a person, and which only need consistency?

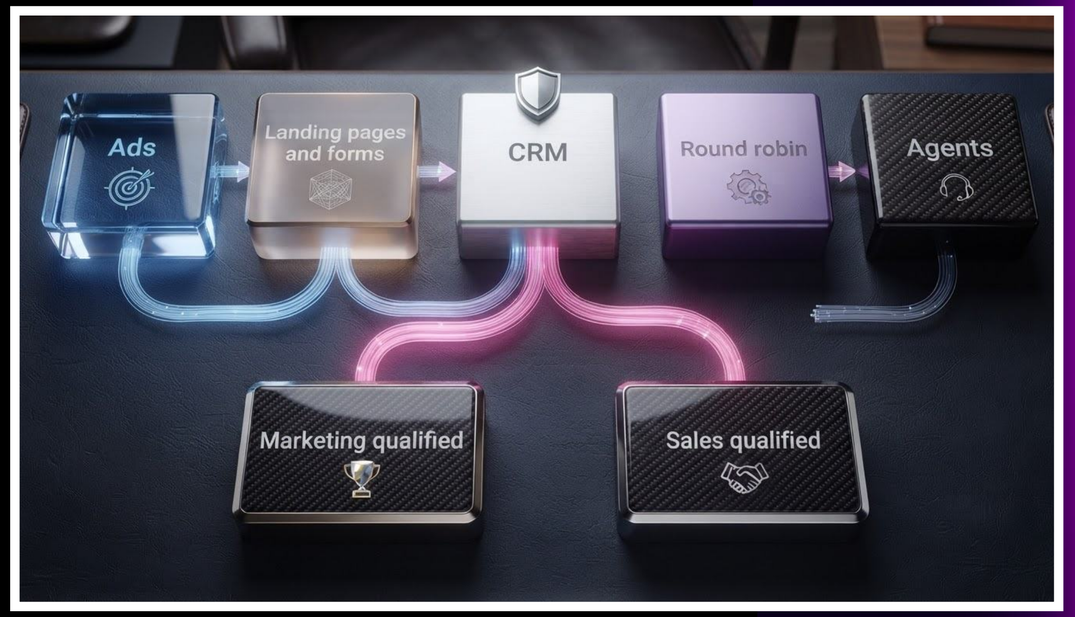
The answers sorted themselves quickly. Most of the lead flow was rules-based, but **the conversation with the prospect wasn't.**

The Possibility: One System, Not Ten Tools

The bigger problem for most agencies we meet is a lot of disconnected pieces: an ad account, a website form, a CRM, an email tool, maybe a texting platform, and a person in the middle moving information between them.

The goal here was to make those pieces work like one system. A lead fills out a form, and seconds later it's in the CRM, owned by an agent, with a follow-up task waiting. Nobody retypes anything, there's no spreadsheet, and nobody decides by hand who gets the next lead.

That's what a fully integrated lead system can do for a BGA or agency. **Every lead gets captured, routed, and followed up the same way, every time.**



The Build:

The Possibility: One System, Not Ten Tools

We didn't build this system all at once. It grew as the agency's needs grew, and our team added each piece when it was needed. That kind of lexibility is the reason to have a fractional marketing and technology department.

Here's how the work sorted into the article's three buckets.

Bucket 1: What We Automated

These were the repetitive, rules-based steps. They needed consistency more than judgment.

- **Lead capture:** Facebook ads sent prospects to landing pages and to on-platform lead forms, and both flowed directly into the CRM.
- **Round-robin assignment:** new leads from approved sources were shared evenly across the agent team.
- **Follow-up tasks:** every assigned lead created a task, so the next step was never left to memory.
- **Pipeline workflows:** in-CRM automations re-routed leads that sat untouched, cleared out junk and disconnected records, and kept every lead moving to its next stage.
- **Multiple sources, one system:** website quote forms and outside lead sources were brought into the same routing logic, each with its own rules.

Picking the right tool for each stage is part of our job.

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Bucket 2: What We Enhanced

Not every lead is ready to talk the day they fill out a form. In this system, the layer on top of the core automation was nurture rather than AI.

A small nurture email campaign kept cold leads warm, and SMS campaigns (some run by a third-party partner) were integrated into the same system.

That's what the middle bucket is for. It adds something on top of solid automation that supports the relationship while the people stay in charge of it.



Bucket 3: What We Protected

We protected the conversation itself.

Talking about life insurance means talking about family, money, and what happens when you're gone. That trust can't be automated. In this system, the real conversation always belonged to a licensed agent.

This is the bucket that decides whether a lead becomes a client.



The Team Behind It



A system like this takes more than one skill set. Over the course of the project, the agency had a whole team to draw on:

- **Systems and automation:** designing the routing logic, CRM workflows, and integrations.
- **Development:** building and maintaining the integrations, including migrating the workflows**.**
- **Paid social and creative:** running and improving the Facebook campaigns and keeping cost per lead in the $9-$12 range.
- **Email marketing:** designing the automated nurture campaigns.
- **Strategy and account leadership:** weekly working sessions with the agency to set priorities and adjust as needs changed.

That's the fractional model in practice. The agency got a full marketing and technology department, scaled to what they needed at each stage, without hiring one.

The Turning Point:

500 Leads a Week



At its peak, Apis's Facebook ads were delivering 500 leads a week at $9-$12 cost per lead, and every one of them was captured, routed, and assigned automatically.

By any lead-generation measure, the system was a success.

But lead volume and closed business are two different results. Sales didn't rise along with the leads, and that's where the most useful part of this story starts.

The system did its job. What happened after the lead arrived (the follow-up, the nurture, and the lead's experience of being contacted) is what decides whether a lead converts, and no automation can do that part alone.

Lead volume on its own doesn't produce sales. It takes good marketing and nurturing behind it, and here's what we learned about why.

The Insight:

Volume Isn't Sales



A lead form is one moment in a longer decision. Life insurance is about as considered as decisions get. It means talking about family, money, and what happens when you're gone. Someone who filled out a form on an ad may be curious but not ready to talk yet.

That changes what happens next. If the first follow-up feels like a cold sales call, the lead's experience works against you, no matter how fast the system delivered them.

Leads aren't sales.

A lead form is one moment in a longer decision.



What we took away:

- Automation brings in volume and speed, and that part works.
- Conversion takes nurture: helpful follow-up, education, and time.
- The lead's experience matters. How the first contact feels shapes whether a lead becomes a client.
- Marketing and sales are different jobs. Marketing earns the lead and keeps it warm, sales earns the client, and the automation connects the two.
- Expectations have to be set up front. A lead system is only the start of a sales process.

Where Marketing Ends and Sales Begins

This is the line we now draw with every client, before anything gets built. The automation connects marketing and sales. It doesn't replace either one.

Marketing does

(what Apis builds and runs)

- Attracts the right prospects with targeted ads
- Builds landing pages and forms that make it easy to raise a hand
- Nurtures leads who aren't ready yet, with email, SMS, and helpful content
- Shapes the lead's experience, so every touch feels relevant and human
- Stays top of mind through a long buying process, well past the first click

Sales does

(the agency's side)

- Follows up quickly and personally when a lead arrives
- Listens, asks the right questions, and builds trust
- Evaluates fit and recommends the right coverage
- Closes the business and stays in the relationship

The automation connects them

- Captures every lead and puts it in the CRM
- Re-routes leads that stall, so none are forgotten
- Routes each lead to the right agent and creates the next task
- Keeps both sides working from the same record

When everyone knows which side owns what, expectations stay realistic. Marketing is measured on reach, lead volume, cost per lead, and lead quality. Sales is measured on contact, appointments, and closed business. **The system makes the hand-off smooth, but both sides have to do their part.**

How Apis Runs Automation Projects Now

This project changed how we run every automation project. It follows the order of operations from "Sorting the Work," with expectation-setting built in from day one.

01 **Start with discovery.** We begin with your pain points and process gaps, instead of a list of tools, and sort each one into automate, enhance, or protect.

02 **Draw the marketing and sales line together.** We agree up front on what marketing (and Apis) owns, what the agency's sales team owns, and how the automation connects them. A system can deliver leads at speed and scale. Closing them is still a sales job.

03 **Build a nurture plan alongside the system.** Lead routing never ships on its own. Follow-up sequences, education, and a human first conversation are part of the plan from the start.

04 **Agree on success metrics before we build.** That means lead volume, cost per lead, speed to contact, and appointments set. We decide together which numbers define success, so everyone is measuring the same thing.

05 **Prove it small, then scale.** We build a small proof of concept on one piece before anything gets built at scale.

Ready to Sort Your Workflows?

Bring your list of pain points. We'll help you sort what to automate, what to enhance, and what to protect, and we'll agree on what success looks like before anything gets built.

Think of us as your fractional marketing and technology department: one team for strategy, ads, web, CRM, and automation, scaled to what you need.

Apis Productions

Create. Connect. Thrive.