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PRACTICAL GUIDE FOR BROKERS

How a CRM can transform *your insurance agency*

Dozens of CRMs on the market and very few built for brokers and agencies. What a specialised CRM has to do, the six most used compared, and the checklist to choose well.

A Foliume guide | 2026 edition | 6 minute read

A CRM helps you organise and manage every interaction with your customers. One designed for insurance does quite a bit more: it automates the work that eats up your day.

01 THE WHY

Why insurance agencies need *a specialised CRM*

A CRM designed for the insurance industry lets you:

- Automate renewals, reminders and follow-ups.
- Centralise policy and client data.
- Track leads and opportunities across your sales pipeline.
- Give agents real-time guidance and next best actions.

The result

+ team productivity

+ client satisfaction and retention

+ revenue, with less manual work

02 THE MARKET

The most used CRMs *in insurance*

01 **Foliume: cross-sell, retention and eliminating manual work**

An AI platform that connects with the agency's current tools and automates repetitive tasks. At the centre is Wilbert, the AI agent that quotes, renews, opens claims and deals directly with insurers, with your team approving from the same board. AI: advanced targeting and automation. Price: contact us.

02 **Zoho CRM: multichannel communication and mid-sized agencies**

Email, phone, chat and social tools in one place. Customisable, intuitive and with a built-in AI assistant. AI: yes. Price: 18 to 55 USD per user per month.

03 Avant2: portfolio management and multi-quoting

Helps brokers manage their portfolio and streamline quoting. Focused on operations rather than automation. AI: no. Price: not publicly listed.

04 ForceManager: agencies with mobile or field teams

Now part of Sage Sales Management, it offers strong mobile access, performance tracking and customisable sales pipelines. AI: activity-based recommendations. Price: 14.50 to 42.50 EUR per user per month.

05 Odoo: open-source setups and customisation

Odoo's CRM module works well for agencies already using Odoo apps. Highly customisable, with strong integrations across business functions. AI: no. Price: free for one app.

06 Salesforce: large insurers and enterprise-scale teams

Advanced automation, analytics and deep integrations, ideal for agencies with complex operations. AI: Salesforce Einstein. Price: 25 to 330 EUR per user per month.

Comparison guide

CRM	BEST FOR	STARTING PRICE	AI FEATURES	INTEGRATIONS
Foliume	Cross-sell and retention	Contact us	Yes	Yes
Zoho CRM	Multichannel communication	$18 per user	Yes	Yes
Avant2	Portfolio and multi-quote management	Not public	No	Yes
ForceManager	SME agencies with field teams	€14.50 per user	Yes	Yes
Odoo	Open-source custom setups	Free (first app)	No	Yes
Salesforce	Large-scale insurers	€25 per user	Yes	Yes

03 BEFORE YOU DECIDE

Checklist *for choosing a CRM*

When choosing a CRM, ask yourself:

- Does it support insurance-specific workflows: renewals, policy tracking, cross-sell?

- Can it integrate with your current tools and systems?
- Does it offer AI that helps you take action, not just store data?
- Is it mobile-friendly and easy to use for agents on the go?
- Will it scale with your business?

CONCLUSION

What's next?

Use this guide to shortlist the right CRM for your agency.

If you are ready to eliminate manual work and grow smarter with AI, Foliume is built for you: AI models for retention and cross-selling, seamless connection with your current tools, smart reminders and dashboards for agents and managers, and scale from 10,000 to more than 100,000 active policies.

Choosing the right CRM is choosing how much time you give back to your team.

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The guide tells you what to do. *Foliume* does it with you.

Your team and AI agents on the same board to quote, serve clients and deal directly with insurers. You approve, Wilbert executes.

Meet Wilbert →

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