



CASE STUDY

Helping **Insurance Brokers** Find the Right Data Solution Partner

How Comprehensive Contact Intelligence and Enriched Broker Profiles Enabled a U.S. Insurance Brokerage Network to Streamline Operations and Improve Decision-Making

i **Industry:** Insurance Brokerages and Agencies across the U.S., focused on Applied Epic AMS users

i **Geography:** USA (U.S. insurance brokerages and agencies nationwide)



The Engagement in Numbers

A targeted data intelligence engagement covering U.S. insurance brokerages and agencies running Applied Epic as their Agency Management System.

Decision-Makers

COOs, CEOs, and C-suite executives fully covered at target firms

4 Deliverables

Coverage, Intelligence, Enriched Profiles, and a Ready-to-Use Dataset

THE CHALLENGE

A Fundamental Data Gap

The client needed to identify and connect with the right decision-makers within U.S. insurance brokerages, but lacked the granular intelligence required to target effectively. Generic industry lists could not provide the technology context, role-level accuracy, or enriched contact details necessary for meaningful outreach in a highly competitive market.

"The client was looking for the right data solution provider to streamline their operations and improve decision-making. Generic data was not going to move the needle in a market as relationship-driven and role-specific as insurance brokerage."

— Span Global Services, Applied Epic Engagement Summary

THREE CORE CHALLENGES

What Was Missing



Identifying the Right Decision-Makers

Reaching COOs, CEOs, and C-suite executives required precise role-level targeting that standard industry databases simply could not deliver.



Technology Stack Visibility

Without insight into which brokerages ran Applied Epic, targeting efforts risked reaching firms with no operational context for the client's offering.



Incomplete Contact Profiles

Existing data lacked AMS vendor details, CRM integrations, lines of business, and enriched contacts with verified emails and direct phone numbers.

BEFORE VS. AFTER

Closing the Data Gap

Span Global Services addressed every dimension of the client's data shortfall, from decision-maker access to campaign readiness.

Data Gap	Before Span Global	After Span Global
Decision-Maker Coverage	Generic roles, limited C-suite reach	COOs, CEOs and C-suite fully covered
AMS Technology Insight	No visibility into Applied Epic usage	AMS vendor details included per firm
CRM & Integration Data	Absent from existing datasets	CRM integrations and tech stack mapped
Contact Profile Depth	Email only, no supporting data	Email, phone, address and social media
Lines of Business	Not captured	Lines of business and policies managed
Campaign Readiness	Additional cleansing required	Ready-to-use from day one

Four Core Deliverables

Span Global Services delivered a comprehensive, enriched intelligence solution across four dimensions, with each purpose-built to address a specific gap in the client's data and outreach capability.

1

Comprehensive Data Coverage

Targeted coverage of COOs, CEOs, and C-suite executives across U.S. insurance brokerages actively using Applied Epic.

2

Company & Contact Intelligence

In-depth intelligence including AMS vendor details, CRM integrations, lines of business, and policies managed, a complete operational picture of each target firm.

3

Enriched Contact Profiles

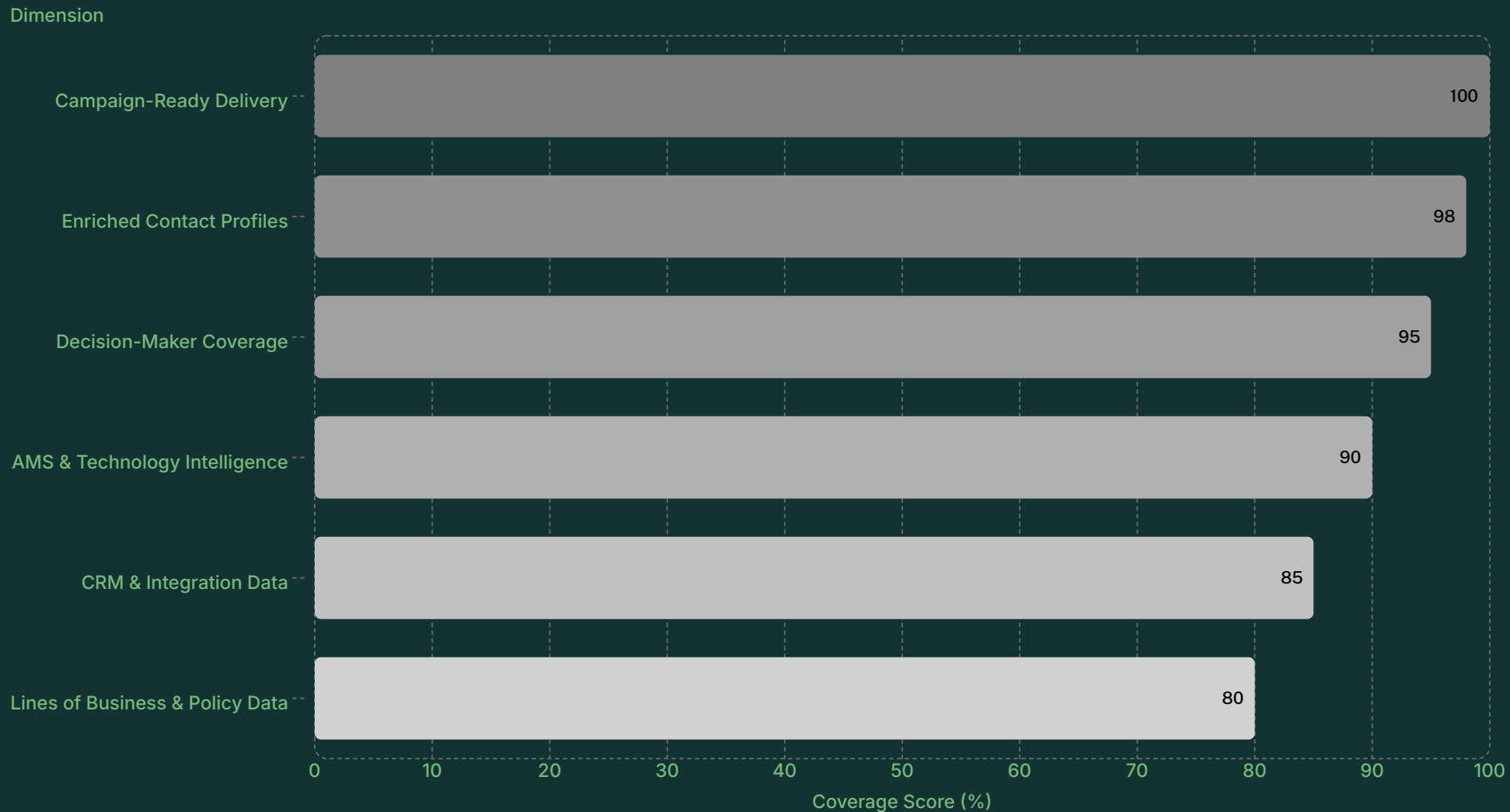
Fully enriched profiles with verified emails, phone numbers, physical addresses, and social media links, campaign-ready from the moment of delivery.

4

Ready-to-Use Dataset

A complete, validated dataset serving as a single source of truth for the client's go-to-market efforts, no additional cleansing or preparation required.

Intelligence Coverage Across All Dimensions



Dataset Highlights

AMS vendor details confirmed at account level for every Applied Epic firm

CRM integration data and implementation details captured per organization

Lines of business and policies managed documented per target brokerage

Verified emails, direct phone numbers, and social media profiles per contact

C-suite decision-makers identified at COO, CEO, and executive level

Dataset delivered ready-to-use, zero additional cleansing required

RESULTS

Measurable Impact Across Every Dimension

C-Suite

Decision-Maker Coverage

COOs, CEOs and senior executives fully covered at target brokerages

4+

Data Points Per Contact

Email, phone, address and social media profiles delivered per record

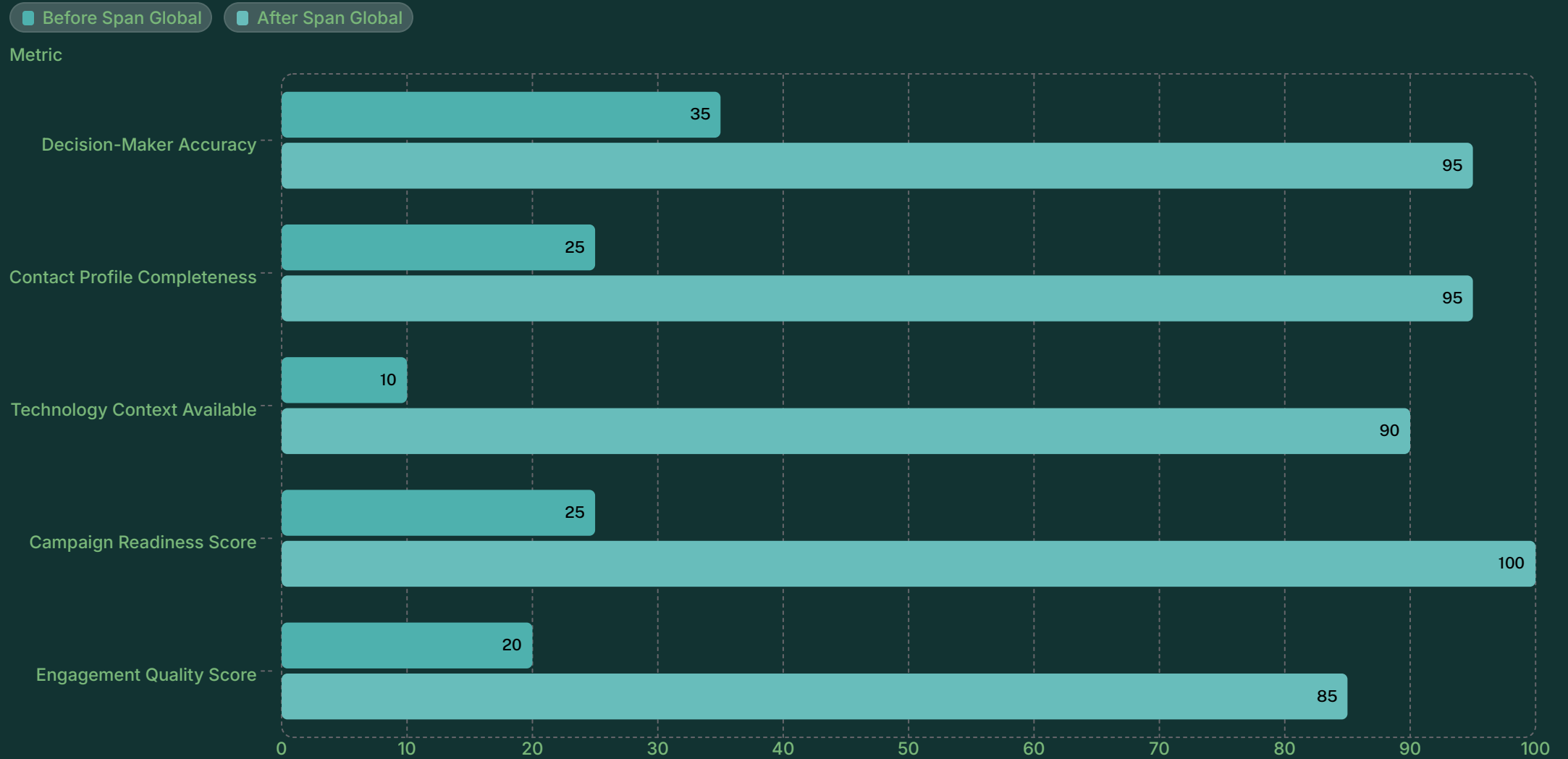
100%

Campaign-Ready Delivery

Dataset delivered with no additional cleansing or preparation needed

BEFORE VS. AFTER

Outreach Capability: The Transformation



Three Outcomes Enabled

Targeted Outreach

Precision data replaced broad outreach with focused, relevant engagement at the right firms.

Enhanced Engagement

Enriched profiles enabled conversations tailored to each brokerage's technology environment.

Strategic Growth

A unified intelligence asset directly supported strategic planning and growth execution.

Ready to Connect with the Right Insurance Decision-Makers?

This engagement demonstrates the measurable value of precision data intelligence. By delivering comprehensive decision-maker coverage, enriched profiles, and Applied Epic-specific intelligence, Span Global Services equipped the client with a ready-to-use dataset that directly supported outreach, engagement, and strategic growth.

"This engagement highlights how our data solutions can help organizations identify and connect with the right decision-makers in highly targeted markets. If your company is looking to improve data-driven sales and marketing effectiveness, let's talk about how we can help you achieve the same results." — [Span Global Services](#)

Technology-Specific Targeting Wins

Knowing a brokerage runs Applied Epic provides immediate operational context for relevant outreach.

Role-Level Precision Is Non-Negotiable

Reaching COOs and CEOs demands verified, accurate decision-maker profiles, not generic lists.

Ready-to-Use Data Accelerates Revenue

Verified, campaign-ready datasets let teams launch outreach immediately, compressing the sales cycle.

[Talk to Our Team](#)

[Browse Technology Lists](#)