



## **BROKER CASE STUDY**

# **Richard Bautista**

Commercial Lines Advisor  
BrokerLink



Since partnering with  
**APOLLO**, my closing ratio  
has increased by 15%.



## BROKER BACKGROUND

### Meet Richard Bautista of BrokerLink, member of the APOLLO broker community.

Richard Bautista is a Commercial Lines Advisor with BrokerLink who has worked in the industry for the past three years.

Starting off in personal lines, Richard quickly moved into commercial lines, which has become his specialty as an advisor. He shared with APOLLO that he chose a career path in insurance because the industry is fairly stable, and he gets to learn a variety of skills that can make a difference to customers.

Richard's favourite policy to bind is small business insurance for hospitality ventures, with a particular interest in restaurants. He loves learning about their menu offerings, and then supporting the businesses by dining in!

Excited by all of the technological advancements the industry continues to make, Richard looks forward to better serving his customers with each new improvement.

## THE PROBLEM:

# Traditional Insurance Is Inefficient

**As an advisor, Richard found it difficult to find the right information quickly and efficiently to provide his clients with the coverage they needed.**

It's not uncommon for brokers to deal with the inefficiencies that are still commonplace in the insurance industry. From paper-based processes to broad policies that don't necessarily fit the unique requirements of a business, traditional insurance is not known to be particularly modern or efficient.

This was frustrating for both Richard and his clients. Not only did he find that it could be difficult to provide his customers with the exact coverage they needed, he also recognized that they often needed their policies immediately. Of course, most traditional policies take days – sometimes weeks – to process.

Richard knew this wasn't how he wanted to do business. So, he began looking for a solution. In a widely digital world, surely he could find something to help him better serve his clients.

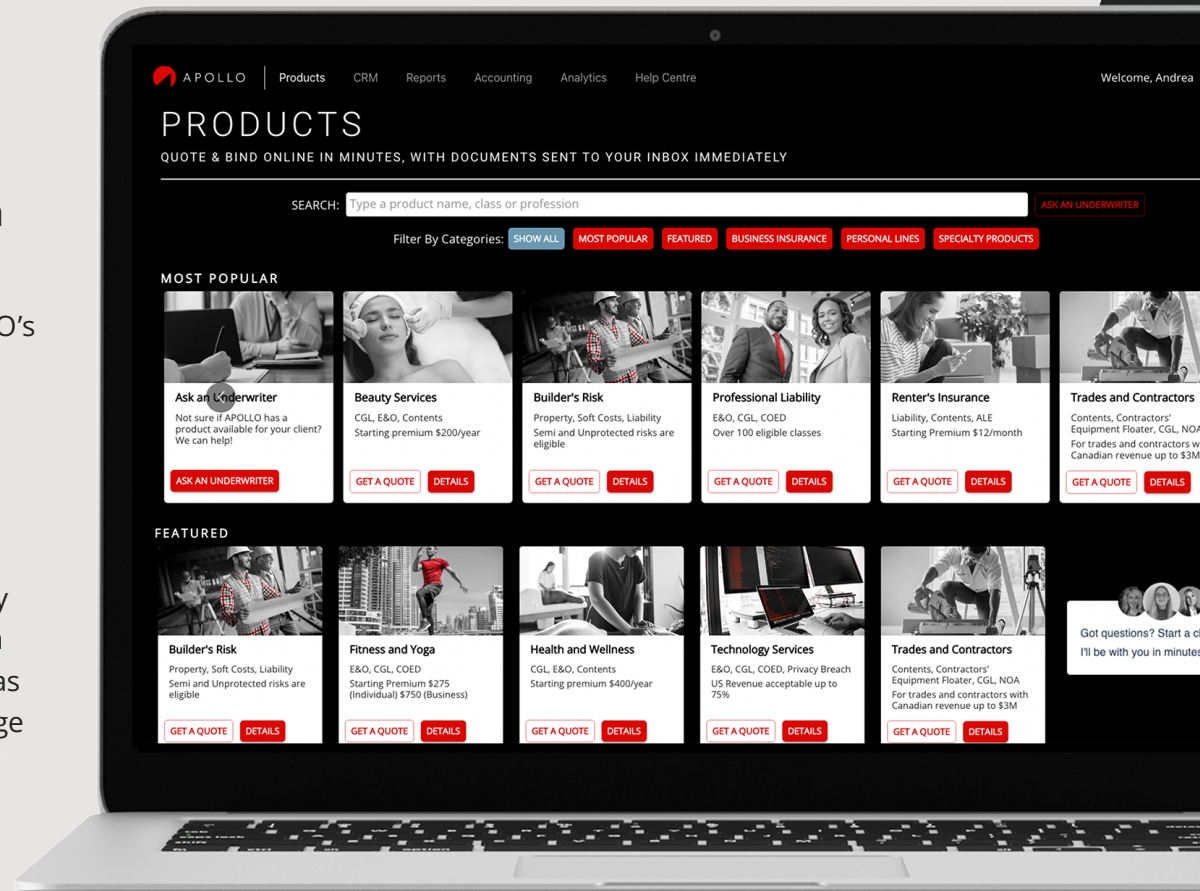
**THE SOLUTION:**

# APOLLO's Broker Portal

With our Broker Portal, Richard has been able to seamlessly find, quote, and bind the coverage his clients need - with instant document delivery.

Not long after he began his search, Richard found APOLLO's Broker Portal. He signed up and, in minutes, Richard was able to find detailed information about our insurance products.

Richard loves that our digital marketplace breaks down different industries and coverages, and that it distills all the information he needs in one convenient place, entirely online. What's more, with APOLLO he's able to generate a quote and bind commercial insurance on the spot. This has helped him provide his clients with the immediate coverage they'd been asking for.





### THE RESULTS:

## A 15% Increase in Closing Ratio

Partnering with APOLLO has helped Richard substantially increase his closing ratio by offering him a seamless digital workflow.

Richard has noticed a 15% uptick in his closing ratio since signing up for the APOLLO Broker Portal. From the easy-to-use platform to the one-stop-shop digital marketplace, he says that APOLLO offers a smooth workflow for brokers.

He's been particularly impressed by his interactions with product specialists and APOLLO's Business Development Managers, noting that every touchpoint is stress free for brokers.

“

“APOLLO really does take the time to listen to brokers on feedback to better improve, making the experience a collaborative team environment, rather than solely transactional.”

Richard Bautista,  
Commercial Lines Advisor  
BrokerLink

# What APOLLO Brokers Are Saying

**APOLLO is a leading Canadian InsurTech with a CSAT Score above 99.54% that greatly values the human experience of buying insurance.**

At APOLLO we're on a mission to make insurance effortless. We envision a world where computers do the work, so people can build relationships. Here's what brokers have to say about how we're doing.



**Above 99.54%**  
CSAT Score



**“I absolutely love APOLLO!!! The ease of doing business with them has put the way of the other companies far behind.”**

Veralin Phillips-Michael, Calgary Branch Manager  
First Foundation Insurance

**“APOLLO has been an integral part in building the Novinger Insurance Team brand.”**

Nick Novinger, Sales Representative  
Canadian Insurance Brokers Inc.

**“APOLLO has been a game changer for our agency.”**

Stanislav Kojokin, Managing Partner  
KASE Insurance

# Start Binding Now

Help your clients get the coverage they need, when they need it. Quote, bind, and issue policies instantly on the APOLLO Broker Portal.

[Bind Now](#)

