



“ The new quote system has halved the time it takes to obtain a quote... ”



Every second counts – How Source have halved your quoting time

Source Insurance recognise that advisers' time is valuable, so they've introduced major system enhancements to help you save time when quoting for clients.

Whether you're quoting for one client or working with multiple, you need a home insurance process that is fast and simple.

Based on valuable feedback from advisers, Source determined key pain points and addressed them directly. Advisers shared their needs, and Source responded.

The result is a quicker, smoother, and more efficient quoting experience.

Log in today and start a quote: broker.thesource.co.uk.

Cutting Declarations by Over Half

One of the most significant changes is the reduction of Declarations from 27 to 13. Reducing these streamlines the quoting process and saves advisers time on GI.

This change makes the process more manageable while still collecting essential information. By saving time, you can concentrate on other important aspects of your services.

Moving Client Contact Details to Quote Ending

Source have also moved email and telephone details to the *Summary of Cover* page.

Advisers requested that contact details appear after a quote is obtained. This reduces barriers to finding the right quote and makes the process more natural and sequential.

By removing these barriers, advisers can find quotes more easily and reduce possible friction with clients.

They've Removed a Step to Reach the Panel

Source understand that advisers value reaching pricing as quickly as possible.

Combining the Person and Property pages reduces steps to one before you access the panel of insurers.

This results in fewer clicks, less navigation, and a clearer route from property to panel.

What This Means for You

- Less time spent on questions
- Less navigation across pages
- Less client information to check
- Smoother end-to-end journey
- Easier system to learn for new users
- Faster route from property details to panel
- Less back and forth, fewer chances for error
- More natural conversation with your client, with fewer barriers

Want to explore the new and improved quoting system for yourself?

Log in today and try a quote!

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