

FOR INSURANCE CARRIERS

See why brokers stay, sell, and advocate.

The measured view of how brokers experience doing business with you,
before it shows up in retention and premium.

THE PREMIUM HIDING IN BROKER EXPERIENCE

Carriers know what brokers sell. Few understand why some brokers sell more, stay longer, or advocate for the brand. Broker experience is the missing growth lever. For every \$1 billion in brokered premium, a two-point improvement in broker retention preserves \$20 to 40 million in premium a year. BrokerPulse measures, quantifies, and improves the experiences that drive broker loyalty, retention, and growth.

\$20-40M

preserved per \$1B in premium,
for a 2-point retention lift.

\$28M

premium preserved,
national health carrier.

\$24M

premium preserved,
regional life & benefits.

Source: VistaXM broker research and program case studies (2025).

BrokerPulse is delivered and fully managed by VistaXM. You subscribe to continuous broker measurement; we produce the intelligence you act on.

WHAT BROKERPULSE GIVES YOU

01 See why brokers stay

Production data tells you what brokers sell. It says nothing about why some advocate and others quietly drift. BrokerPulse measures the experience behind the numbers.

With BrokerPulse: a managed program that surfaces broker sentiment and the reasons behind retention and growth.

The experience you can't see

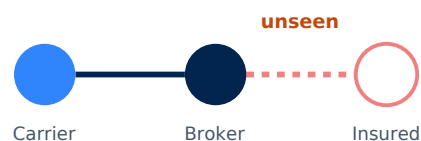


Fig. 1 — The broker blind spot

02 Quantify the premium at risk

Broker experience is a financial lever, not a soft metric. A two-point retention lift preserves \$20 to 40 million in premium for every \$1 billion brokered. BrokerPulse puts a number on it.

With BrokerPulse: retention and growth models that tie broker experience directly to premium.

Premium follows retention

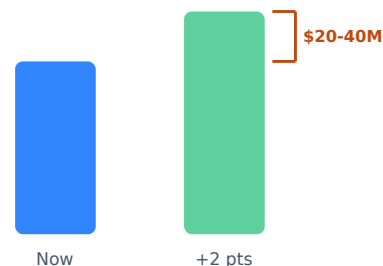


Fig. 2 — Premium preserved per \$1B

WHAT BROKERPULSE GIVES YOU

03 Measure the full broker journey

Experience forms across quoting, underwriting, servicing, claims, and renewal. BrokerPulse measures each stage, so friction like slow underwriting feedback surfaces early enough to fix.

With BrokerPulse: journey-stage measurement that turns broker sentiment into specific, fixable signals.

Catch friction early

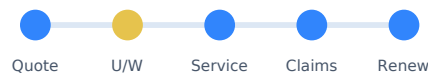


Fig. 3 — Across the broker journey

04 See the Broker Advocacy Index

Promoters, passives, detractors. BrokerPulse gives carriers an independent, certified read on broker advocacy and ease of doing business, benchmarked and trusted across your broker base.

With BrokerPulse: a standardized advocacy index and ease-of-doing-business metrics you can act on.

Broker Advocacy Index



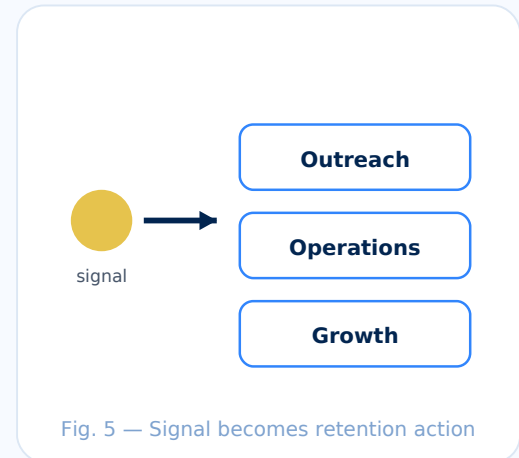
Fig. 4 — Promoters, passives, detractors

WHAT BROKERPULSE GIVES YOU

05 Turn broker signal into retention

A detractor pattern triggers outreach; an underwriting-friction signal routes to operations; an advocacy lift shows where to grow. The signal becomes a move, not a report.

With BrokerPulse: the analysis and workflow that turn broker experience into retention and growth decisions.



PROOF · REAL PROGRAMS, REAL NUMBERS

NATIONAL HEALTH CARRIER

+12 advocacy

\$28M preserved · -18% detractors

REGIONAL LIFE & BENEFITS

+3% renewal

\$24M premium preserved

PER \$1B PREMIUM

\$20-40M

preserved per 2-pt retention lift

"BXM transforms broker management from a relationship function into a measurable performance discipline."

Erik Vogel, Founder & CEO, VistaXM

See what your brokers aren't telling you.

A 30-minute conversation. We show you the broker-experience signal in your own book, and what it means for premium.

[Book a 30-minute call](#)

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