SaaSTech Servers

INDUSTRY WEBSITE GUIDE
Workshop workbook

DOMAINS / WEBSITES / BRANDED EMAIL

Insurance Brokers & Brokerages



Make the next insurance conversation clearer.



Explore a practical website plan and download the guide and planning resources.

Microsoft 365 for your organization.

Make every page useful.

- Separate personal and business conversations
- Introduce brokers with verified roles
- Keep quote enquiries clear and non-sensitive

Register or transfer your domain to SaaSTech Servers.

saastech.net/industry/insurance-brokerages

Scan for the guide and downloadable resources.

SCAN TO EXPLORE

SaaSTech Servers

SERVING CANADIAN BUSINESSES
Since 1999

Everything your business needs to move online.

Your name. Your website. Your business email.



DOMAIN CITY

Make a name.

Find your domain name or bring one you own.

WEBSITE VILLAGE

Build your online home.

Start with Website Builder or explore WordPress.

EMAIL TOWN

Look the part.

Use your business name in your team's email.

Not sure where to start?

Take a walk down Main Street.

Explore industry guides, website ideas and practical steps for your business.

Start at **saastech.net**

SCAN TO EXPLORE

Getting started with SaaSTech Servers

Create your free account before contacting support. Keep the detachable record private.

1 Create or sign in to your account

Use an email you can access and follow the secure account prompts. No purchase is required.

2 Keep your customer number and call-in PIN ready

Support may ask for both during a call you initiated through verified Contact Us.

3 Enable two-step verification

Have your registered phone or authenticator device with you when calling SaaSTech Servers; you may need it to sign in or verify the account yourself.

Create My Account | saastech.net/create-account

Contact Us	Account Learning Centre	Delegate access playlist

On Contact Us, check your language/region and currency settings, then use the local contact number shown there.

The Account Learning Centre covers setup and delegation for Website Builder and other services. Choose Work with delegates.

Cut or tear out the card below before sharing this workbook

PRIVATE account reference and call-in authentication

Organization or name _____

Account sign-in email _____

Customer number _____

Call-in PIN _____

Domain names _____

Reviewed on _____

Update your call-in PIN at pin.saastech.net or in My Account after signing in.

Never share your account password or call-in PIN with someone helping manage your services. Each helper should create their own SaaSTech Servers account and receive only the delegated permissions they need. Review purchase/payment and account-security permissions carefully.

For official support, give the call-in PIN only during a call you initiated through verified Contact Us. Never share passwords, sign-in verification codes or recovery codes.

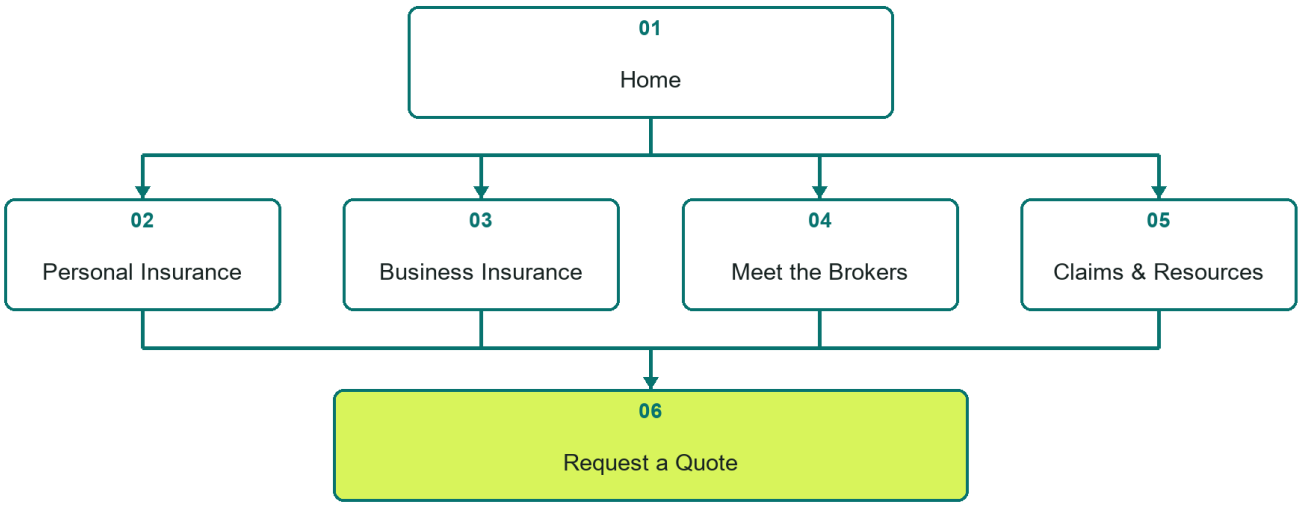
Do not record passwords, verification/recovery codes, security answers or payment details here. Keep this card safe and cut or tear it out before sharing the workbook.

Use a secure password manager for passwords and recovery information.

WEBSITE PLANNING WORKSHOP

Insurance Brokers & Brokerages Website workbook

Plan a clear website for insurance brokers & brokerages. Explore a worked example, shape your own message and prepare to build with SaaSTech Servers.



Your recommended pages at a glance

Inside this workbook

Six page examples • Practical writing exercises • A launch review

Use it in a workshop or at your own pace. Write by hand or complete the response fields in Word. The final page links to Website Builder, plans and account signup.

Example business Prairie Harbour Insurance

INSURANCE BROKERS & BROKERAGES

Your website brief

A SaaSTech Servers workshop for insurance brokers & brokerages. Plan your website, learn from the Prairie Harbour Insurance example and draft content for your own business.

Each page has a reference sheet followed by a writing sheet. Demo excerpts are labelled separately from new sample wording, which may differ from the screenshot. Click a blank response line to type; longer answers may add pages. Replace fictional details and verify every claim before publishing.

Your business or organization and workshop date

Who should visit your site and what do they need

The main action you want a visitor to take

What you offer and where or how you provide it

Facts photos and permissions to gather before publishing

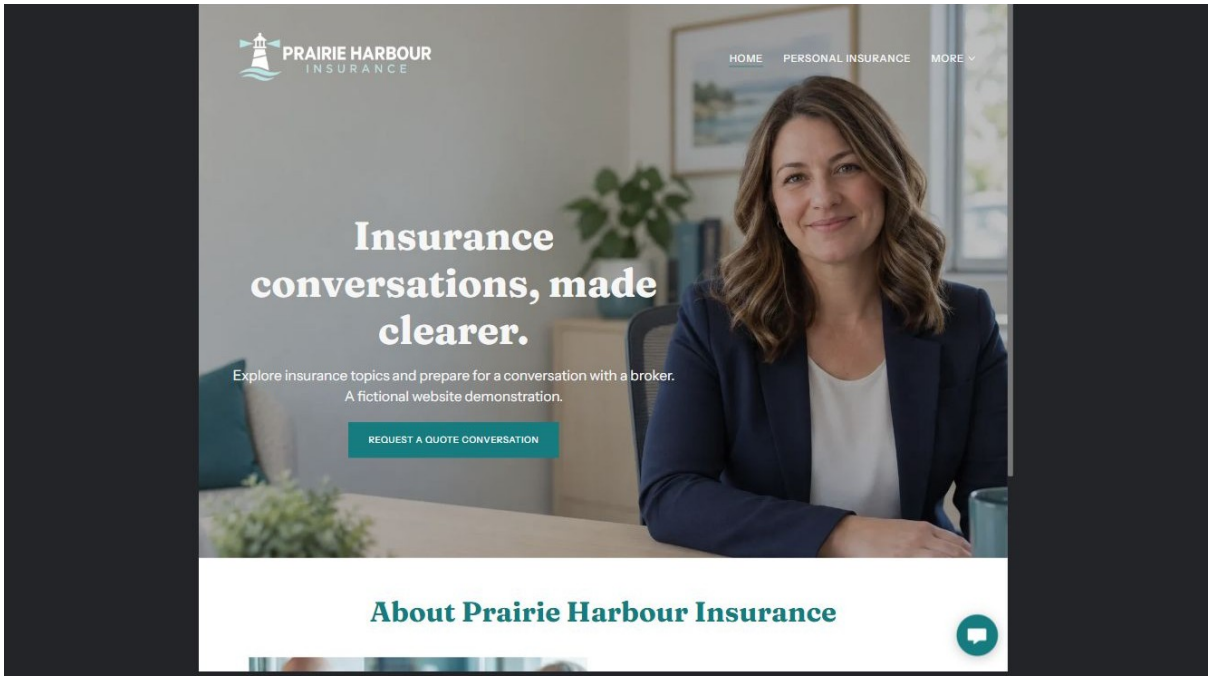
Workshop rhythm: review the example, write your draft and exchange feedback. Use the final review to choose your next changes. Website Builder and account links are on the last page.

LOOK AND LEARN

Home

The job of this page

Introduce the brokerage, the communities it serves and the conversations it can help with. Use one clear next step. Verify all savings, credentials and insurer relationships before publishing.



Prairie Harbour Insurance example | Explore SaaSTech Servers Website Builder

Demo text example

Insurance conversations, made clearer.

Explore insurance topics and prepare for a conversation with a broker. A fictional website demonstration.

Pause and plan

Could a first-time visitor explain what you do and who it is for after one glance? Choose one main action and the strongest truthful detail that gives them confidence to continue.

1 Home
2 Personal Insurance
3 Business Insurance
4 Meet the Brokers
5 Claims & Resources
6 Request a Quote

WRITE YOUR PAGE

Home

Write for your visitor. Be specific about what they need to know and what happens next. You can revise the wording after the workshop.

Your page headline

Your opening paragraph

Your offer audience location and most useful supporting details

Button or link wording and where it should lead

Photo idea caption and permission or credit needed

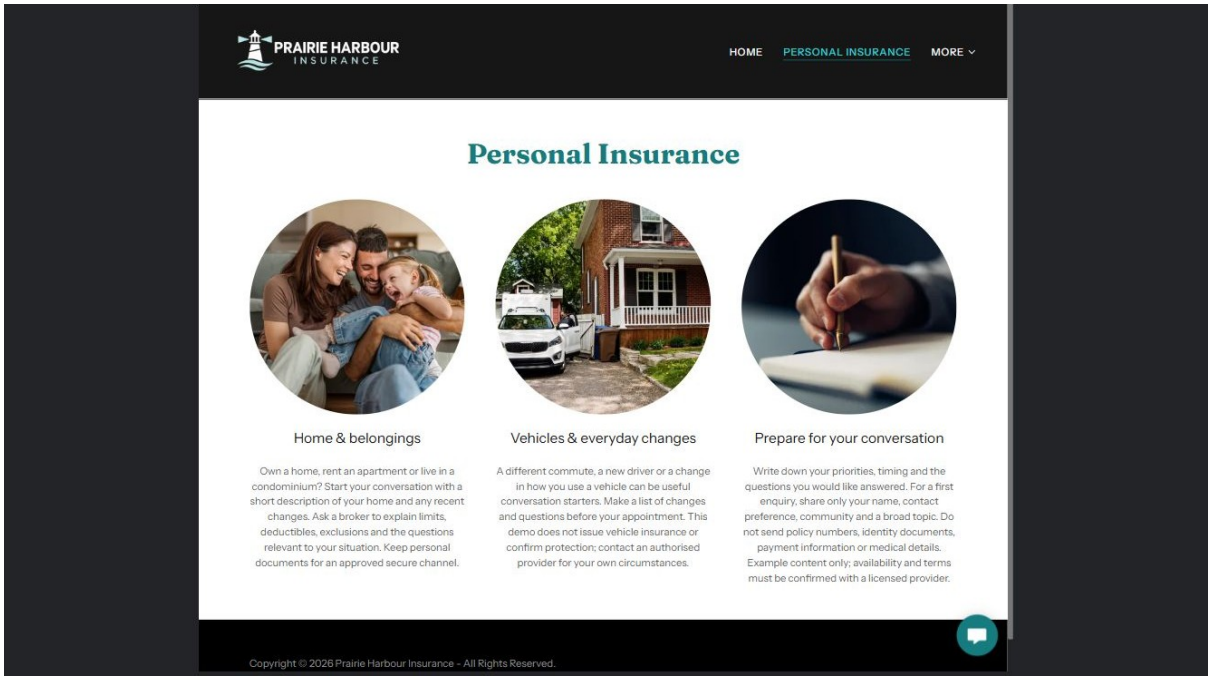
Facts to verify or questions to resolve

LOOK AND LEARN

Personal Insurance

The job of this page

Explain only the personal insurance categories your brokerage actually arranges. Help visitors prepare questions without promising eligibility or presenting examples as policy wording.



Prairie Harbour Insurance example | Explore SaaSTech Servers Website Builder

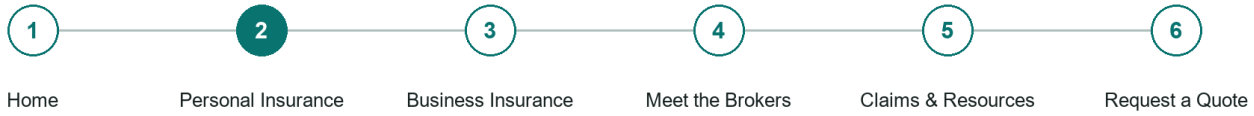
New sample wording

Start with what you want to protect

Tell us whether your questions concern your home, belongings or a change in your everyday life. We can explain the next steps for a conversation with a broker. Any options, terms and availability require individual review.

Pause and plan

What question brings a visitor to this page? List the details they need, the evidence you can provide and the next useful action. Remove content that does not help them decide or proceed.



WRITE YOUR PAGE

Personal Insurance

Write for your visitor. Be specific about what they need to know and what happens next. You can revise the wording after the workshop.

Your page headline

Your opening paragraph

Key sections visitor questions and supporting details

Button or link wording and where it should lead

Photo idea caption and permission or credit needed

Facts to verify or questions to resolve

LOOK AND LEARN

Business Insurance

The job of this page

Help owners describe their activities, property and recent operational changes. Explain the conversation and review process without suggesting that one package covers every business.



Prairie Harbour Insurance example | Explore SaaSTech Servers Website Builder

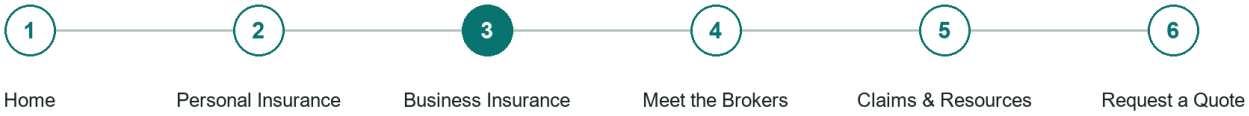
New sample wording

A conversation about your business

Start with what your business does, where it operates and what has changed. Prepare questions about property, equipment and activities so a broker can identify the information needed for a review.

Pause and plan

What question brings a visitor to this page? List the details they need, the evidence you can provide and the next useful action. Remove content that does not help them decide or proceed.



WRITE YOUR PAGE

Business Insurance

Write for your visitor. Be specific about what they need to know and what happens next. You can revise the wording after the workshop.

Your page headline

Your opening paragraph

Key sections visitor questions and supporting details

Button or link wording and where it should lead

Photo idea caption and permission or credit needed

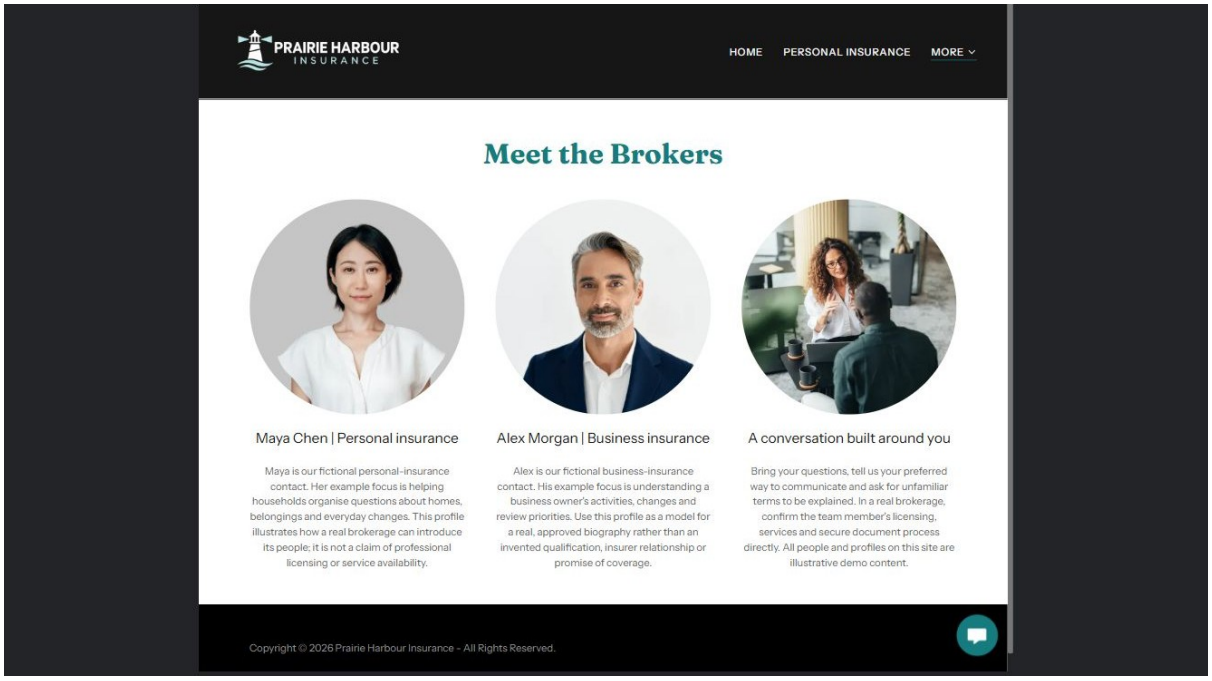
Facts to verify or questions to resolve

LOOK AND LEARN

Meet the Brokers

The job of this page

Use distinct portraits and verified roles. Obtain permission to publish names and photographs. Check specialties, experience and licence information. Label fictional example profiles clearly.



Prairie Harbour Insurance example | Explore SaaSTech Servers Website Builder

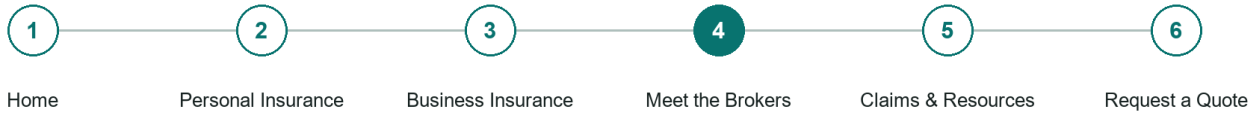
New sample wording

Meet your first point of contact

In this fictional example, Maya introduces personal insurance conversations and Alex introduces business insurance conversations. On your own site, replace these profiles with your team's verified roles, biographies and permission-cleared portraits.

Pause and plan

What question brings a visitor to this page? List the details they need, the evidence you can provide and the next useful action. Remove content that does not help them decide or proceed.



WRITE YOUR PAGE

Meet the Brokers

Write for your visitor. Be specific about what they need to know and what happens next. You can revise the wording after the workshop.

Your page headline

Your opening paragraph

Key sections visitor questions and supporting details

Button or link wording and where it should lead

Photo idea caption and permission or credit needed

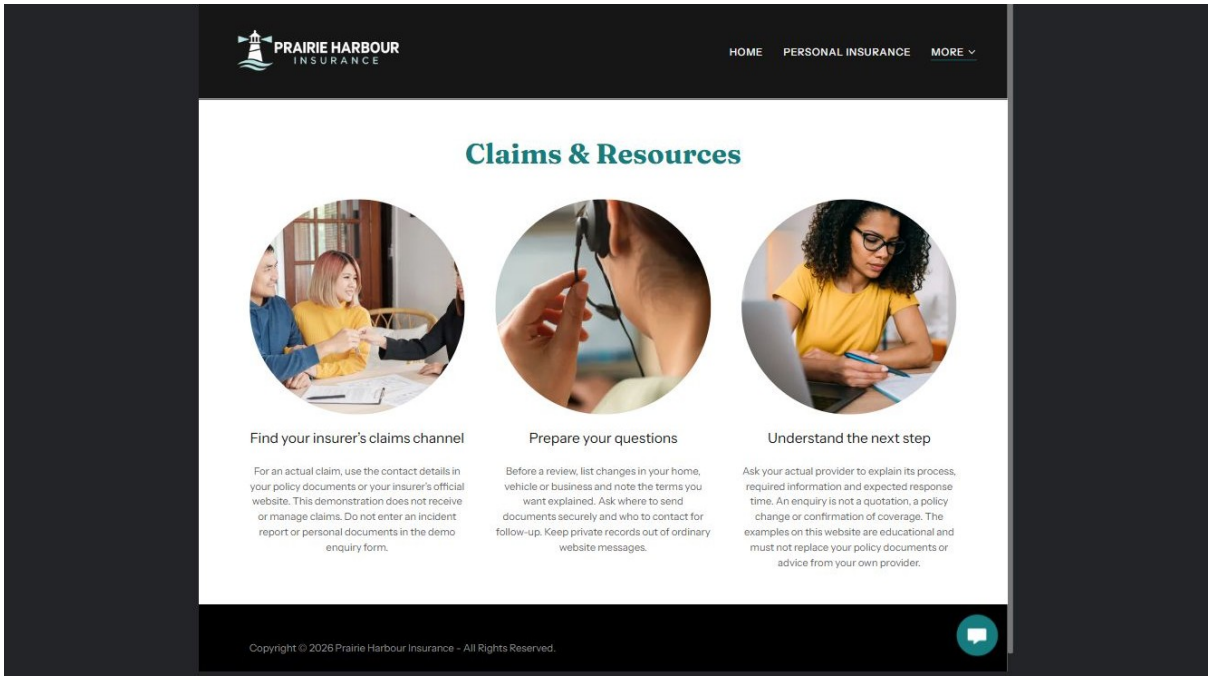
Facts to verify or questions to resolve

LOOK AND LEARN

Claims Resources

The job of this page

Point visitors to verified insurer contacts and explain which route to use. Keep office hours and links current. Do not receive claims documents through a basic public website form.



Prairie Harbour Insurance example | Explore SaaSTech Servers Website Builder

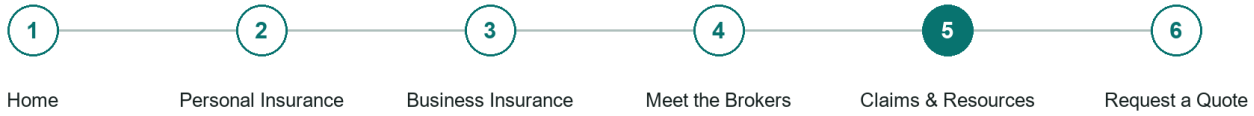
New sample wording

Find the right next step

Use your insurer's current claims instructions and confirmed contact details. Keep a short list of questions for your conversation. This example website does not accept claims or arrange coverage; replace its placeholders with approved information before launch.

Pause and plan

What question brings a visitor to this page? List the details they need, the evidence you can provide and the next useful action. Remove content that does not help them decide or proceed.



WRITE YOUR PAGE

Claims Resources

Write for your visitor. Be specific about what they need to know and what happens next. You can revise the wording after the workshop.

Your page headline

Your opening paragraph

Key sections visitor questions and supporting details

Button or link wording and where it should lead

Photo idea caption and permission or credit needed

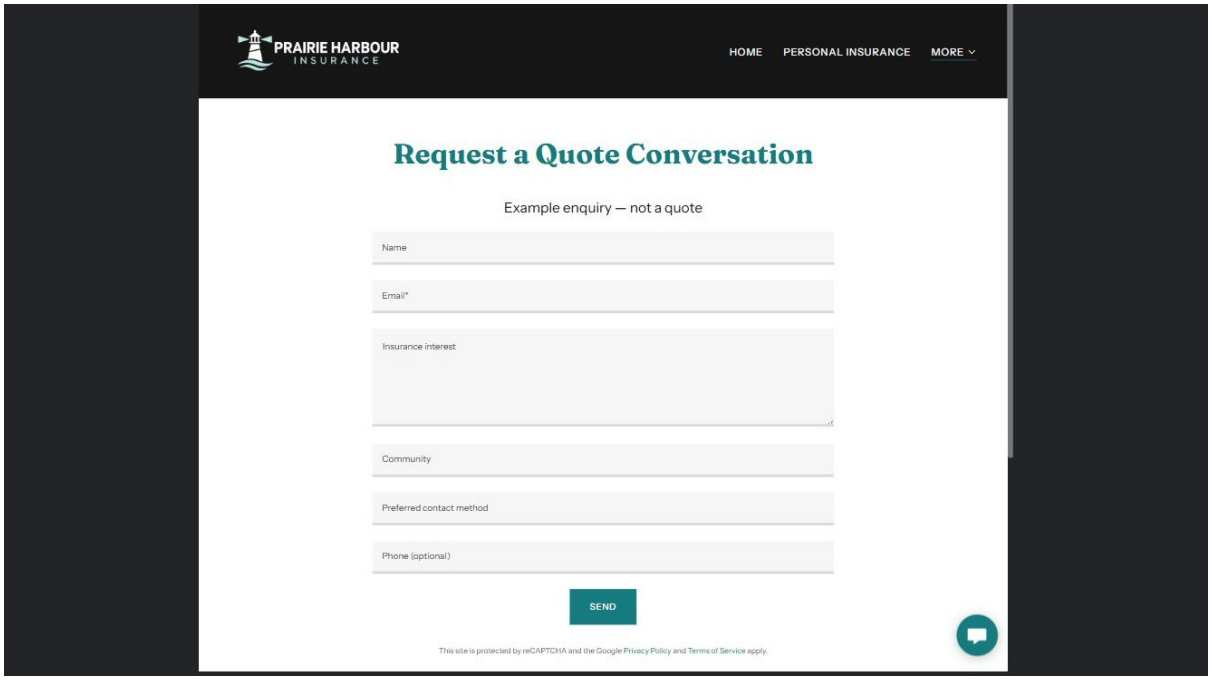
Facts to verify or questions to resolve

LOOK AND LEARN

Request a Quote

The job of this page

Request only contact details, general insurance interest and community. Explain the reply process. Keep policy numbers, identity documents, payment details and medical information out of a public form.



Prairie Harbour Insurance example | Explore SaaSTech Servers Website Builder

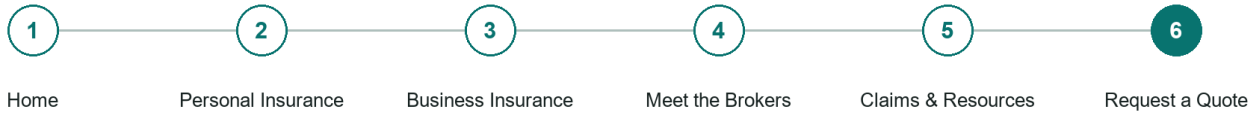
Demo text example

Request a Quote Conversation

Example enquiry — not a quote

Pause and plan

What must someone provide, and what happens after they send it? Separate a request from a confirmed booking, order or place. Decide what information should stay out of a public form.



WRITE YOUR PAGE

Request a Quote

Write for your visitor. Be specific about what they need to know and what happens next. You can revise the wording after the workshop.

Your page headline

Your opening paragraph

Information to request and how you will reply or confirm

Button or link wording and where it should lead

Photo idea caption and permission or credit needed

Facts to verify or questions to resolve

WORKSHOP CLOSE

Review and next steps

Ask a partner to read your draft as a first-time visitor. Can they explain what you offer, who it is for and the next step without extra help?

Before you publish

[ ] Every page has a clear purpose and a useful next step.

[ ] Headlines are specific and the wording sounds like your business.

[ ] Names, service areas, prices, dates and policies have been checked.

[ ] Credentials, testimonials and results are genuine and permission-cleared.

[ ] Photos support the text, do not repeat needlessly and have appropriate permissions.

[ ] Forms ask only for necessary information and explain what happens next.

[ ] Links, downloads and the main visitor task work on a phone.

The most useful feedback from your workshop partner

First change to make and who will do it

Information or photographs still needed

Target review date and who will approve the final content

Keep sensitive customer, patient, employee and payment information out of this workbook. Completing it does not publish a website or connect to Website Builder.

BUILD WITH SAASTECH SERVERS

Put your draft into Website Builder

Use the content you have written to build your own site. Keep the insurance brokers & brokerages demo as a reference, and replace its company name, images and claims with your verified business information.

Explore the builder

See the editor, compare available plans and decide which features your business needs. Confirm current pricing and terms before purchasing.

Website Builder overview

Create your account

Set up your SaaSTech Servers customer account using your own details. Creating an account is separate from purchasing a Website Builder plan.

Create your SaaSTech Servers account

Choose your plan

Open the secure shop to review the plan, subscription term and final total. Use the account connected to your purchase when you open your service.

View Website Builder plans

Build and check your pages

Add the pages from this workbook. Transfer your approved wording, upload permission-cleared photos and review each page on desktop and mobile before publishing.

Return to the Website Builder guide

Using a printed workbook

Type these short addresses into your browser. The account guide includes the Create My Account button.

www.saastech.net/products/website-builder

www.saastech.net/create-account

This workbook does not create an account, purchase a plan or publish your website. Keep passwords, payment details and confidential customer information out of your draft.