PolicyTek Publishes Free Guide Library for Life Insurance Agents as PolicyOcean Expands No-Medical-Exam Quote Access

Free guides for agents on life insurance leads, final expense leads, and software for insurance agents, plus expanded no medical exam life insurance quote comparisons through PolicyOcean.

San Diego, California Nov 12, 2026 (Issuewire.com) - PolicyTek, the CRM for insurance agents built specifically for life insurance, has published a free public guide library covering how agents find and work life insurance leads and final expense leads, alongside expanded consumer quote access through its sister site PolicyOcean.

The guide library, available at no cost on PolicyTek's public documentation site, covers how working agents evaluate software for insurance agents, build a follow-up process for new leads, and handle inbound calls from prospects who are actively shopping for coverage. The first guides address where agents actually find life insurance leads, what good software for insurance agents does across a full working day, and how agents work final expense leads without burning out.

PolicyTek is used by more than 3,800 agents and agencies. The platform combines a lead marketplace, a visual pipeline, a built-in softphone with AI call summaries, a power dialer, live whisper coaching, automated follow-up, renewal reminders, and SEO-ready agent landing pages in one subscription. Agents comparing the best CRM for insurance agents can review the full feature set and pricing on the company's website.

PolicyOcean, the company's consumer-facing site, lets shoppers compare life insurance from more than 50 carriers in about two minutes at no cost. The site offers no medical exam life insurance options, term and whole life coverage, final expense and burial insurance, mortgage protection insurance, and Medicare comparisons, with licensed advisors available by phone.

"Agents do their best work when the routine work is handled for them," the company said in its announcement. "These guides share what is working inside our own user base, and PolicyOcean gives their clients a simple place to compare real quotes."

The guide library is live now and new guides are added on an ongoing basis.

About PolicyTek: PolicyTek is a CRM and lead platform built exclusively for life insurance agents and agencies, combining lead distribution, calling, automation, and policy management in one system. Learn more at https://www.policytek.com/

About PolicyOcean: PolicyOcean is an independent digital insurance agency that lets consumers compare life insurance quotes from more than 50 carriers, including no medical exam options, in about two minutes. Learn more at https://www.policyocean.com/

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