

# BEING AN INSURANCE AGENT CAN BE LONELY WORK. BUT IT DOESN'T HAVE TO BE.



**Ken Abel**, sales director at Trailstone Insurance in Littleton, CO, knows this all too well. Abel has used SalesScreen to connect not only a remote team, but a team comprising independently contracted agents. Reps are either based in Colorado or around the country. **Getting everyone on the same page "is like herding cats,"** said Abel.

Trailstone Insurance is also an independent agency where what reps earn is 100% based on what they bring in. **"It's a leap of faith" joining such an organization, explains Abel. So connectedness is key."**

Before using SalesScreen, Trailstone's prior AMS system didn't highlight individual and team wins in a way that encouraged connectedness. Abel also noted that insurance as an industry is **"20, 30 years behind when it comes to technology."** There's no standardized management platform for selling insurance either. Trailstone Insurance and other operators like it have to use several different platforms to engage leads, send email, update the CRM, and so on.

**"There's lots of moving parts,"** said Abel.

SalesScreen takes Trailstone to the next level. **"In SalesScreen it says, 'Hey, so-and-so just sold a policy,' and it has their picture and their client name, how much it was and what the source was if it was a referral. It creates more visibility and people can get in there and share their GIFs and cheer 'em on."**

In addition to giving Trailstone reps a centralized platform, SalesScreen also provides ways for Abel's team to help each other. **"They are independent contractors and they rely on each other. It's not just me,"** said Abel. **"So if somebody gets help, they can give them an endorsement and give them some coins."**

Overall, partnering with SalesScreen has improved engagement across the organization. **"That's where we're finding the most value,"** said Abel. **"And then the rewards are great."** **"Because they are independent contractors, we can't say you have to be involved. Some of them choose not to be and they don't want anything to do with it. And we just have to be okay with that,"** explained Abel. But those that are engaged will get the most out of the community.



**"We're always just looking to incentivize and grow with the ones that are engaged."**

