

# FIGHT DISENGAGEMENT WITH EMPLOYEE CONNECTION

Sales reps may think of themselves as lone wolves on the hunt—they pursue individual goals, build a book of business and, in some cases, strike out as independent brokers. But lone wolves are a myth. Just like real wolves, sales reps are social animals, and insurance sales managers who keep their packs connected can build a virtuous cycle of engagement and motivation.

## Insurance sales managers' most difficult challenges

MOTIVATION



KEEPING TEAMS CONNECTED



—Source: Insurance sales managers, what are your pain points?, SalesScreen, 2023

➤ **"Keeping everyone connected in a remote environment [is harder] - we used to do offsite things for dinners, etc., but it's hard to do with people that work all over the country."**

—Leader of over 50 insurance brokers, Insurance sales manager survey, 2023

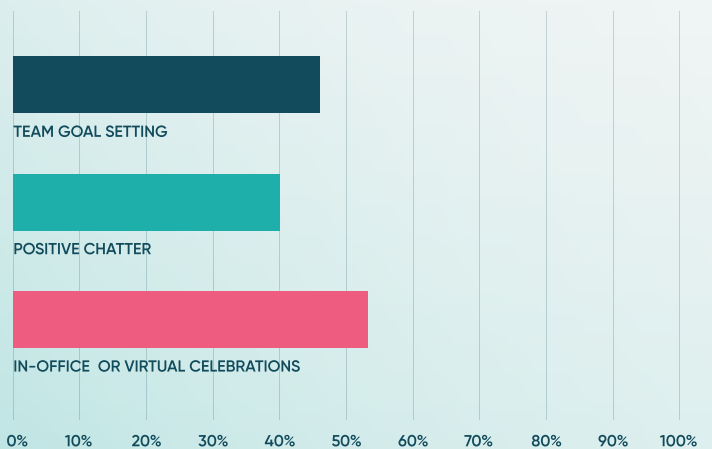
Our August survey of insurance sales managers showed that hybrid and in-person team managers are less concerned with connection than managers of remote teams. However, data suggests that insurance sales managers should look beyond where their team works, as building connections creates a sense of belonging. According to a study by Qualtrix, a sense of belonging was the best indicator of employee engagement and, by extension, motivation.

81%

of engaged employees reported high levels of belonging.

—Source: Qualtrix, 2020

## What makes insurance sales reps feel like part of a team?



"The Motivation Gap", SalesScreen, 2023

To counter the effects of physical separation, or to simply build team connection, insurance sales managers should take the following steps.

## Be transparent.

Transparency encourages cohesion, accountability and an honest company culture. In our report *"The Motivation Gap,"* we found that **46% of insurance agents said team goal-setting helps them feel like part of a team.** Furthermore, a transparent culture allows managers to see where improvements can be made before they turn into problems. As the manager, set team goals and give sellers a clear view into their personal contributions (and challenges) with data visualizations.



## Encourage cooperation.

Give agents the opportunity to help, be helped, and encourage each other. Especially in insurance, where states regulate differently and codes change with the markets, no one can know everything -- so sharing knowledge is key to success for individuals and larger groups. More seasoned reps especially will love being able to share their experiences with new recruits. We found that **40% of insurance agents said positive chatter helps them feel like part of a team.**



## Celebrate wins together.

It's hard to get excited about a deal coming in when your team isn't together: sales floor energy is unparalleled.

But that doesn't mean you shouldn't do it. Give your reps the tools to take a virtual lap when a deal comes in. Share victories in a way that lets them express themselves, like emojis, GIFs or YouTube videos. **53% of insurance agents said in-office or virtual goal celebrations help them feel like they're part of a team.**



Through it all, be the change you want to see as a sales leader.

**"You have to lead by example and be extremely proactive, and produce that culture that gets everybody involved."** – Ken Abel, Sales Director at Trailstone Insurance



**Ken Abel**, Sales Director at Trailstone Insurance in Littleton, CO, uses SalesScreen to connect not only a remote team, but a team comprised of 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 connection. 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, so operators like Trailstone Insurance have to use several different platforms to engage leads, send emails, update the CRM, and more.

**“There’s lots of moving parts,”** said Abel. To keep track of individual and team progress, managers like Abel can spend 2-3 hours a day updating individual stats and compiling reports from siloed programs.

SalesScreen keeps Trailstone’s team connected without that complexity. **“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 gives 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 agents who are engaged.”**

