

Jon Spears, Insurance Agent



“How can I make social media work for me and build my pipeline?”

SOCIAL PROSPECTING TODAY



No clear way to make social media work

SOCIAL PROSPECTING WITH SHARE.TO



**Widen the Net**

Easily engage prospects in any social network

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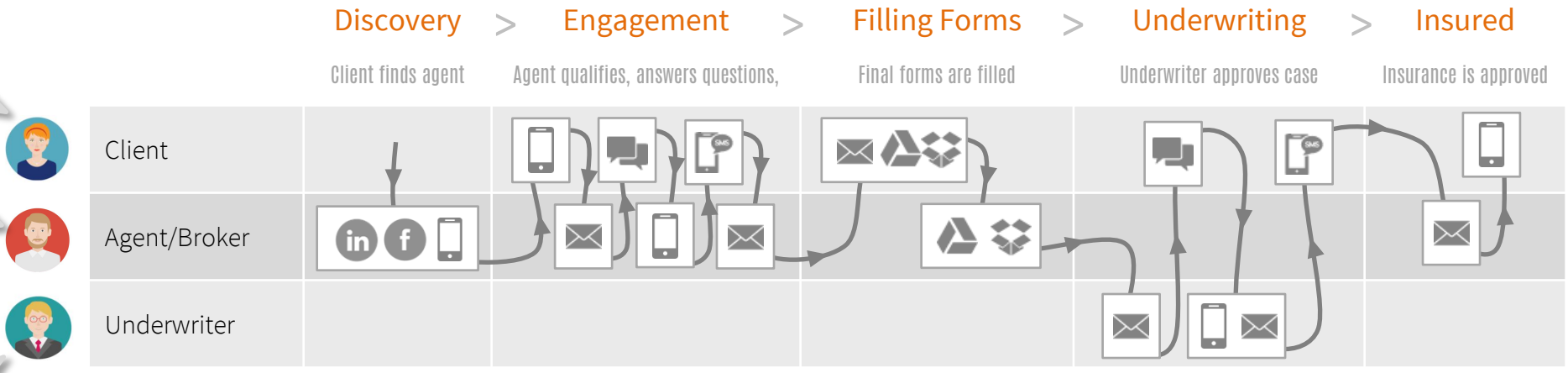
“Wish it was easier to engage my prospects”

**SALES PROCESS TODAY**

This is too cumbersome!

Oh, I can't find where I put the form

Where do I find the trail of conversations & files?

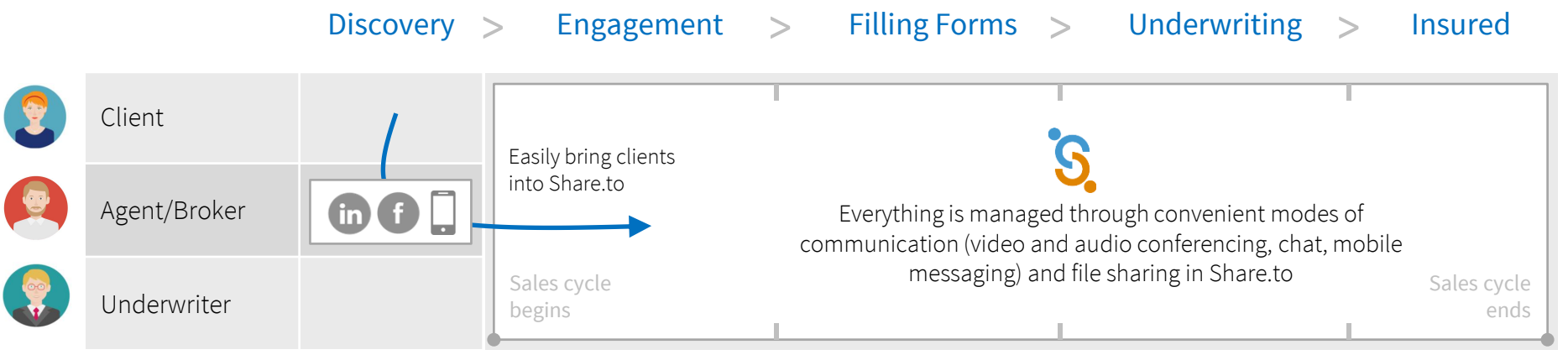


**THE OUTCOME**

Information passes through as many as 7 tools

- ▶ LACK OF TRANSPARENCY
- ▶ DISENGAGED PROSPECTS
- ▶ LONGER SALES CYCLES
- ▶ LOST INFORMATION

**SALES PROCESS WITH SHARE.TO**



**THE OUTCOME**

Single place to interface with client & record info

- ▶ MOBILITY
- ▶ TRANSPARENCY
- ▶ ENGAGEMENT
- ▶ SHORT SALES CYCLES

# A typical insurance sale enabled by Share.to

Prospect discovers agent via social network. Agent invites prospect into Share.to.

Agent answers prospect questions using preferred communication channels  
*Mobile chat, video/audio conf, web chat*

Agent gathers information from prospect

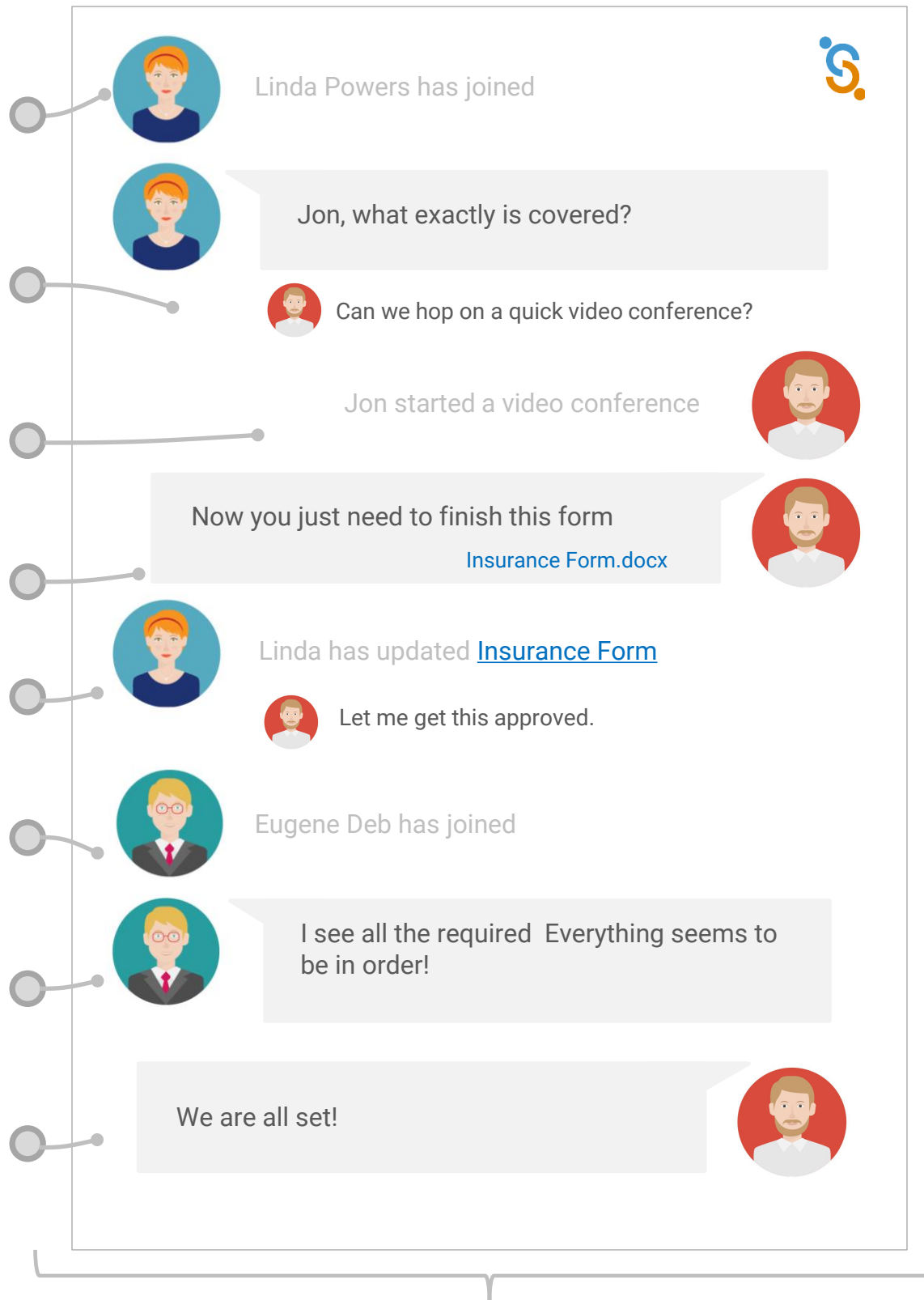
Agent shares forms for prospect to fill

Prospect fills and uploads forms

Agent invites underwriter to assess claim

Underwriter assesses information and approves claim

Agent issues policy. Prospect is insured



## Benefits for agent

- Engage clients however they prefer
- Manage information centrally
- Be mobile
- Shorten sales cycles



## Benefits for customer

- Get a transparent view of app processing
- A single place to get all answers
- Simplify information sharing



## Benefits for insurance firm

- Engage a millennial salesforce with modern web and mobile tools
- Get visibility into sales process
- Secure and centralize communication records



## Benefits for brokers

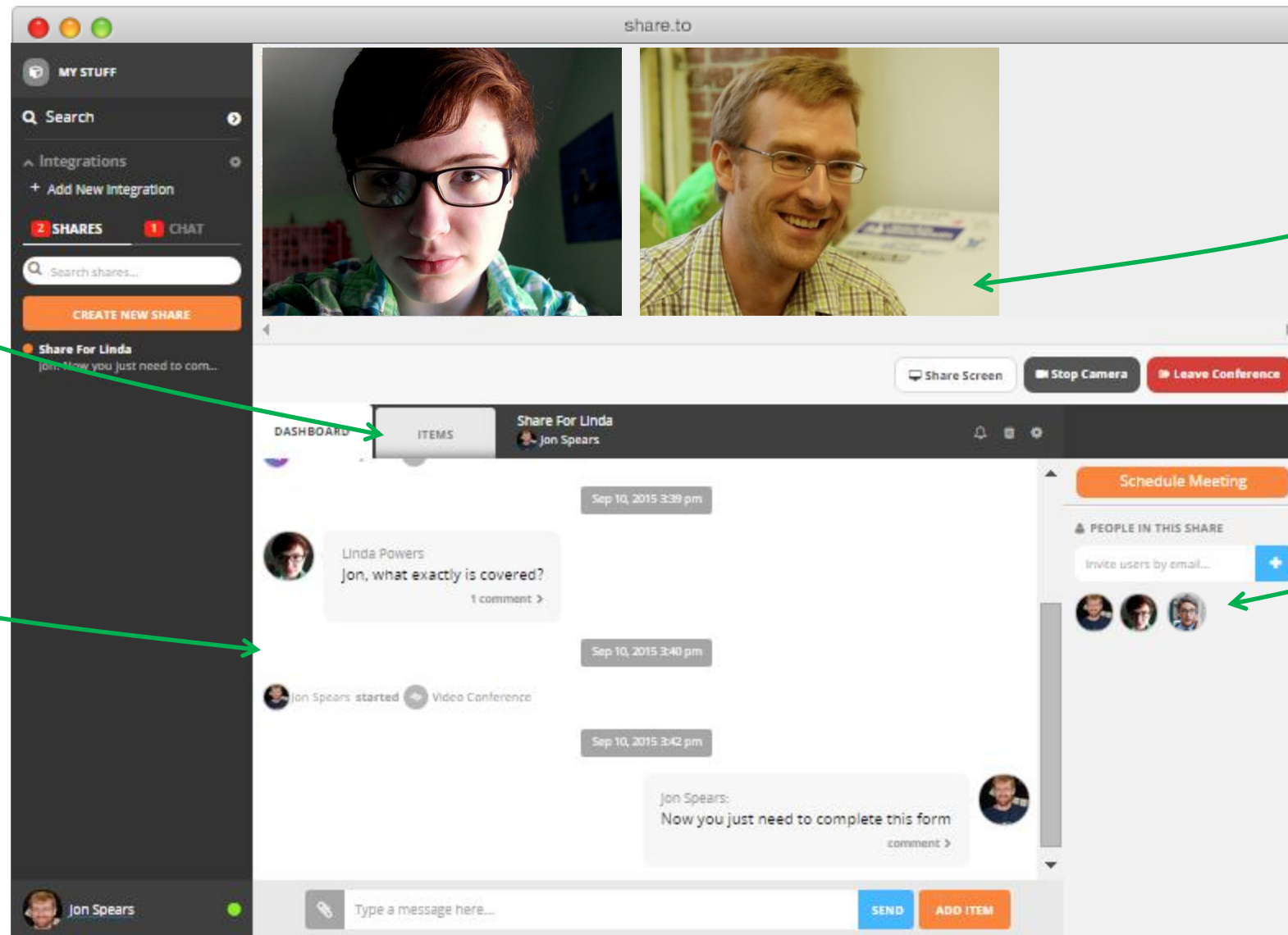
- Simplify coordination with insurance firm back-office
- Empower sales
- Enable upstream and downstream transparency



Any device

# A first look at Share.to

Manage entire insurance prospecting and sales cycle in one place



One stop for sharing information

One stop for all your conversations

Communicate with the most convenient means

Involve anyone – underwriters, brokers, backoffice – as you go.

[www.share.to](http://www.share.to)