

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 uShare.to



Widen the Net

Easily engage prospects in any social network

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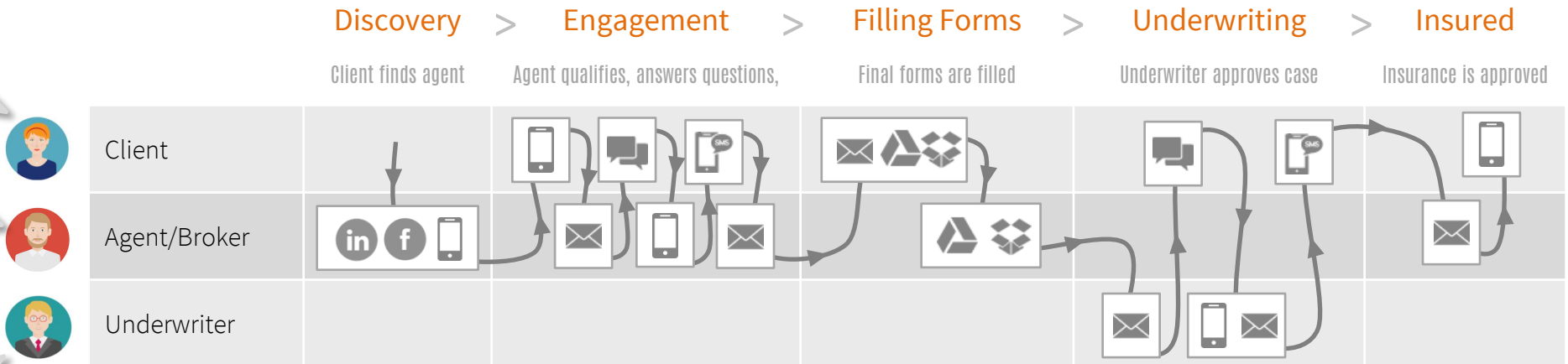
“Wish it was easier to engage my prospects”

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?

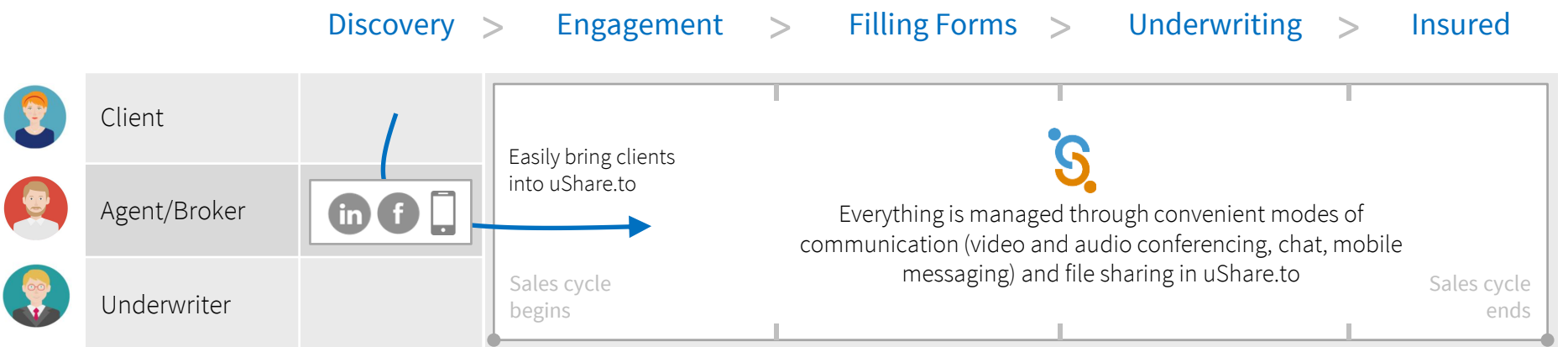


THE OUTCOME

Information passes through as many as 7 tools

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

SALES PROCESS WITH uShare.to



THE OUTCOME

Single place to interface with client & record info

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

A typical insurance sale enabled by uShare.to

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

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

Agent gathers information from prospect

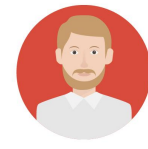
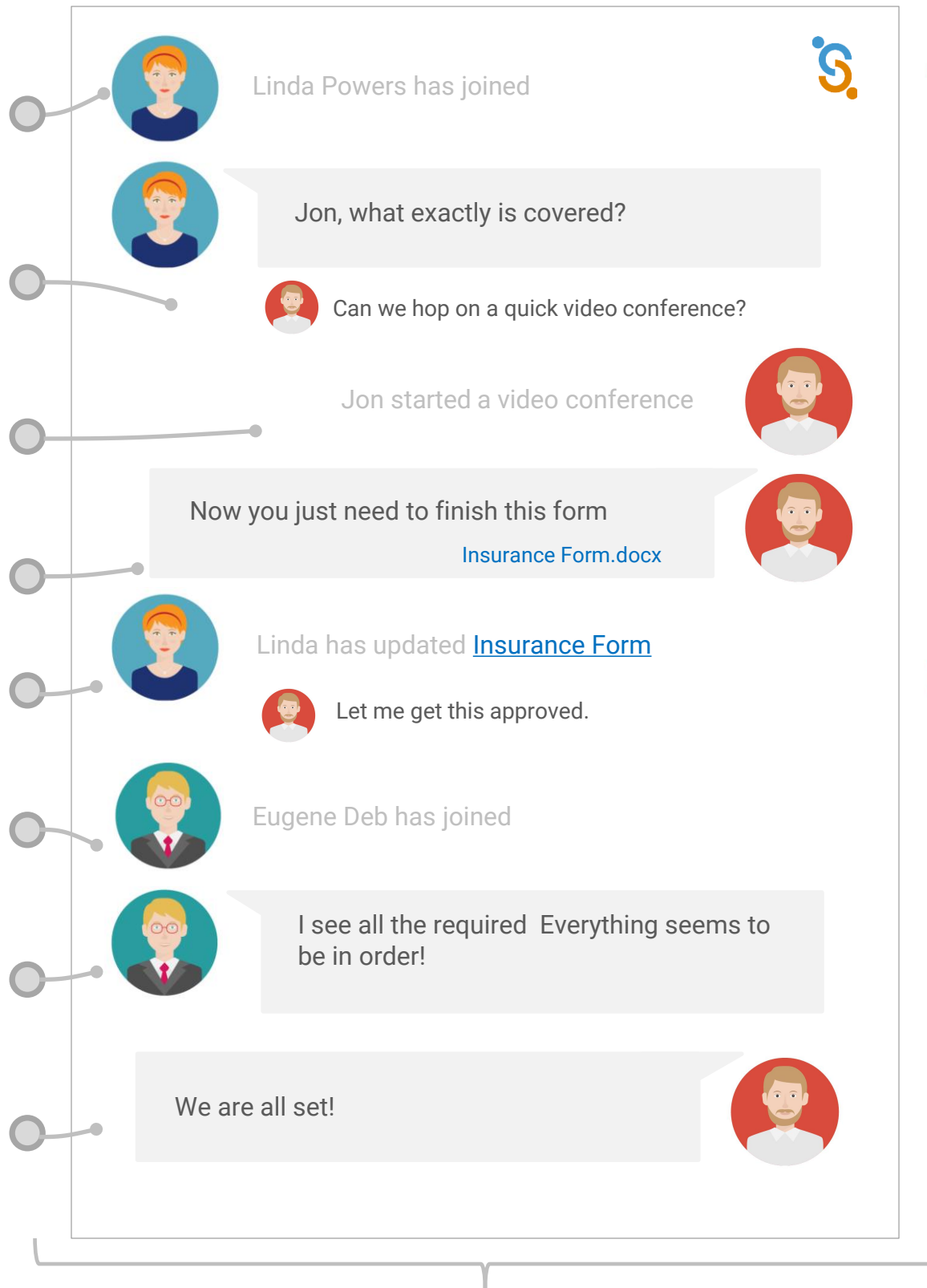
Agent shares forms for prospect to fill

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

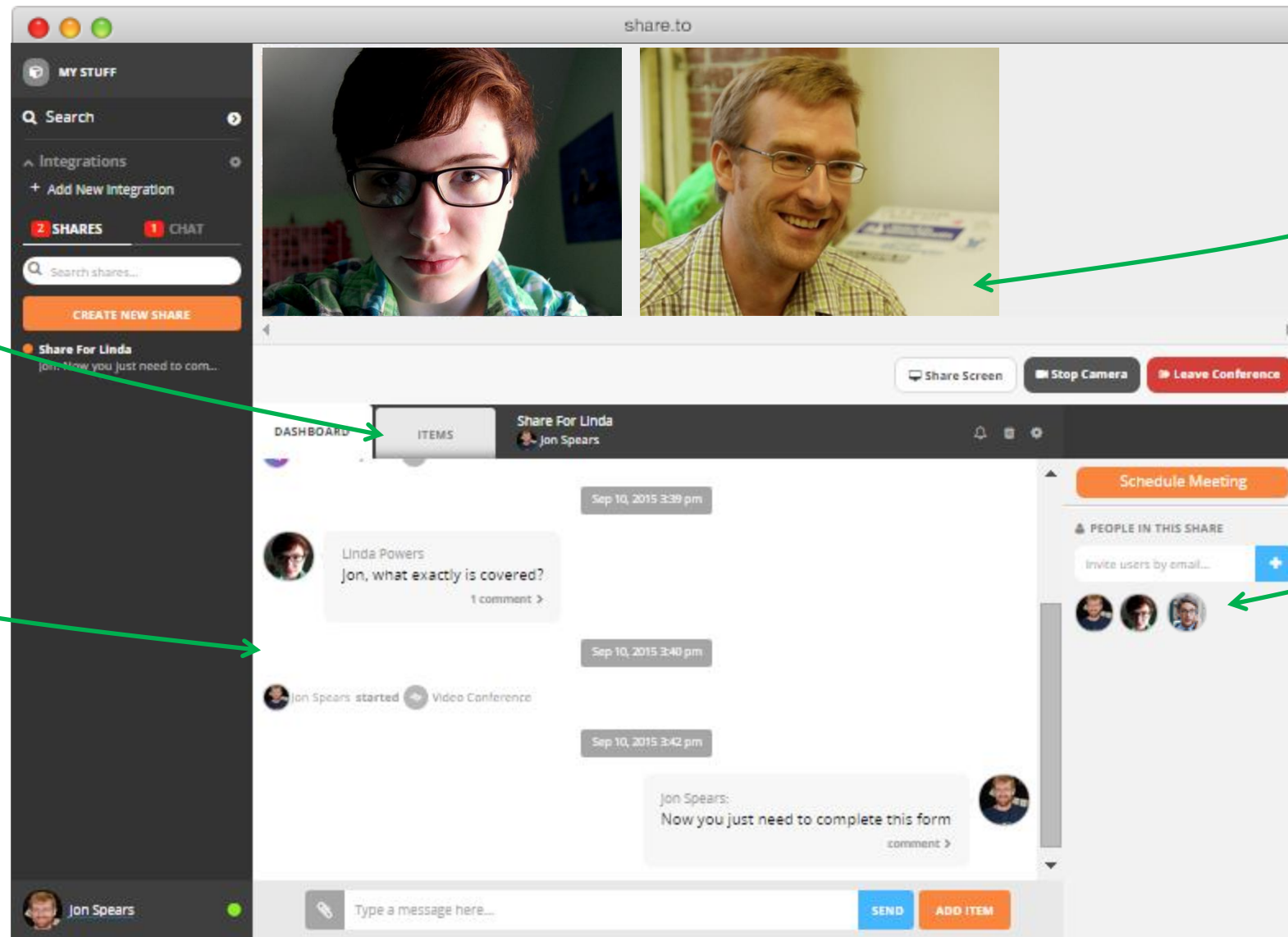
- Simplify coordination with insurance firm back-office
- Empower sales
- Enable upstream and downstream transparency



Any device

A first look at uShare.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.uShare.to