

# The Life Agents' Wish-Grantor

*You asked for it, and Bill Levinson delivered — again.*

On Oct. 1 of this year, well-known technology innovator **Bill Levinson**, managing partner of **Levinson & Associates**, announced the release of brand-new technology designed to make life insurance sales more effortless than ever.

The new release is the latest in a string of new innovations that directly answer the demands of agents. Bill Levinson, who essentially serves as a “wish-granter” in the industry due to his level of agent advocacy, says, “I’m constantly asking myself, if I were an agent just out of school or looking to switch IMOs, what would define a successful relationship? This is how I identify the gaps in what IMOs are offering.”

Levinson noticed a huge gap in client management software. While CRM tools have long been available for life insurance agents, he noticed they were lacking in some very important ways. First, there existed no CRM designed specifically for the life insurance agent, a fact that inspired Levinson to offer a one-of-a-kind platform that is designed for the unique needs of the life agent. Along with this, he accounted for another substantial omission from CRM systems — an integration that actually helps agents sell. This revolutionary feature of the proprietary Levinson & Associates CRM software is a complete, turn-key prospecting and lead generation tool.

The one-stop-shop dashboard that grants easy access to all components is called Agency Automator, and it enables agents not only to manage day-to-day business and client tracking needs, but also to fill their prospecting funnels with custom-selected leads. Simply enter the preferred sales territory parameter; choose an age range; even select income, business type and number of employees; and instantly receive names and contact information directly from a database of 20 million consumers and six million businesses. Send them unlimited emails through Agency Automator, and have full analytics on exactly who opened and clicked on your emails.

Another huge perk rarely available to the life agent for CRMs is the help desk. Whereas other tech companies offer support only via email or will outsource to a call center abroad, Agency Automator comes with U.S.-based support; you can call during Eastern-time business hours, and a live person will walk you through what you need.

The path to such a monumental tool did not come without certain setbacks. The Agency Automator is actually Levinson’s second attempt to create a best-available CRM tool for life insurance agents. The first attempt, while it had many unique and powerful features, proved to be cumbersome to some agents, and Levinson finds any feedback that is less than superior to be unacceptable.

So it was back to the drawing board and a mandate to tap into Levinson & Associates’ secret weapon that has enabled them to develop all their trailblazing technology and products: their radical business practice of carving out an unprecedented percentage of their business’s own



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profit to reinvest into their agent value proposition. “What we do that’s a lot different from our competitors is we’re able to take up to half of our profits and put them back into our sales platform, so agents can have a turn-key system without having to spend hundreds out of their own pockets every month. That’s the secret sauce,” Levinson says. The result is their successful completion of a simple, user-friendly platform that not only tailors CRM functions to the unique needs of life insurance agents, but also delivers leads right in their laps, and it’s available at zero cost to active Levinson agents.

And it doesn’t simply stop at adding thousands of new prospects to agents’ books. The integrated tools available through Levinson’s combined Agency Automator and I-Genius platform will take these prospects all the way to the sale with zero agent involvement.

The system includes multiple pre-built email marketing campaigns (in addition to a multitude of other digital touch points), with several dedicated to Levinson’s exclusive “Sell While You Sleep” (SWYS) products. This 10-product line includes everything from whole life to short-term medical.

The most famous of the SWYS products is Lightning Term Life™, which debuted in 2013 and has since accounted for tens of thousands of zero-agent-involvement product sales. The way it works is, agents receive a custom link, post it on their website, and literally do nothing while consumers are driven to their site via social media, automated email marketing and other sources. The approval is lightning-fast (hence the product name), and policies are mailed within 48 hours. Consumers can even pay online.

While agents have been quite happy with the success of Lightning Term Life, they had been asking for a level term product that they could sell the same way. So earlier this year, Levinson introduced Lightning Level Term, and it has successfully given thousands of agents access to an additional revenue stream that satisfies consumer demand and requires no extra effort on the part of the agent.

“We get a lot of feedback from agents,” Levinson says. “I love to be creative, to take their wishes — no matter how impossible they seem — and push the envelope to design new, cutting-edge products and tools. The reward is getting to see an agent come onboard, implement the technology that we provide and come back six months later saying, ‘I’m now an MDRT producer, and it’s all because of what you put together.’”



Access Agency Automator, Sell While You Sleep products and more at

[www.LevinsonFastLane.com](http://www.LevinsonFastLane.com)