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New Hybrid CRM Provides Leads, Fills Calendars

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There's an all-too-common problem facing agents in the field. And it could be stealing your valuable time and resources.

In short, your CRM software could be out-of-date, or even worse you are not using any CRM tool.

While the technology for logging client details is nothing new, it's been plagued with issues from day one.

First, the data entry process takes an unreasonable amount of time. In fact, it can be so time-consuming that many agents have scrapped the software altogether, in favor of handwriting details in the margins of a rolodex.

Second — and most importantly — most of the CRM software in circulation does quite little, if anything at all, when it comes to generating new business-leads. In other words, it forces agents to bounce from costly lead-software to their CRM and back again, when they should be doing what they do best — selling!

Thankfully, a new generation CRM, built for insurance agents, is starting to make the rounds.

It's a hybrid that not only does all of the time-consuming data entry for you, as you turn a lead into a client; it also generates new leads every month — keeping your client data tidy and all in one place.

At Levinson & Associates, for example, our agents are outfitted with CRM software so powerful that the CRM itself hands each and every one of them **1,000 new leads per month**. That's 1,000 free names, email and mailing addresses, and phone numbers at no charge for all active agents. It's built right into the system, so there is no more wasted time.

The next time you fire up your computer, see if your CRM software is automatically generating leads for you every month. If it isn't, consider the upgrade well worth it. •

Bill L. Levinson is the managing partner of Levinson & Associates, a national life and annuity IMO since 1972 found online at www.carylevinson.com.

