

Agent Sales Journal – February 2008

MySalesResults tracker

Without clear objectives, we'd probably aimlessly stumble through our work day without ever accomplishing a thing. Setting goals and tracking results are two essential functions for any insurance agency, and Hetrick & Associates, the Marquette, MI-based independent agency, aims to meet those needs with MySalesResults.

"We have always measured and tracked sales goals for our producers. How can you expect your agency to grow if there are no set goals? That's just not a good business model," says business development coordinator Jessica Hokenson. She explains that in the past, her agency manually tracked the sales goals for each individual producer, division and the entire agency — which can be extremely time-consuming.

"We wanted to be able to more efficiently allow producers to manage their whole sales process," she says. "Instead of keeping random Excel spreadsheets here and there with their prospects, we wanted one centralized location where they could manage and track their prospects throughout the sales process."

A Web-based tool designed to improve sales management, tracking, and accountability, MySalesResults recently launched its second version. Over the past year, 20 agencies have purchased MySalesResults.

The program features the following three sections:

- My Reports: Producers enter accounts and activity information, including prospects, sales, and referrals
- My Results: Each producer's results are automatically tracked, including accounts quoted, policies sold, closing ratios, and gross commissions. This information can be viewed on a monthly, quarterly, year-to-date, or annual basis
- My Department/Agency Results: This area includes performance results for each department and the agency as a whole, based on each producer's accomplishments

Constantly updated with real-time information, these reports can be accessed via the Internet.

For more information, or to schedule a demo, visit www.mysalesresults.com.