



Insurance Brokers: Closing the Deal with Mikogo

Insurance is a tough sell. It's such an important issue, customers are intimidated even before they discover how complex the policies are. They worry that a small mistake will cost them coverage in some future crisis. They worry about having to share their medical histories, and they worry that the stranger on the phone is just thinking about his commission rate.

To recapture the intimacy and clarity of a live presentation, independent agent Chad Harris of QuotesWi, uses Mikogo to put policy options side by side, using the software's pointer to guide the client.

"All policies look the same, but the devil is in the details," the Wisconsin-based agent says. "Insurance policies are very complex and confusing, but with Mikogo, I can cut through the obscurity in five minutes."

Privacy & Trust

A shared Mikogo session also helps when it comes time to share intimate medical histories, notes Gary Miller, an agent with US Health Group. "It allows the customer to feel more confident giving you some of their sensitive information if they can see forms and questions on the screen rather than just a voice on the other end of the phone," he says.



"If I can get them into Mikogo, the chance of me closing the sale increases easily by 100%"

- CHAD HARRIS, INSURANCE AGENT, QUOTESWI

Confidence—trust—is important in making the sale, and in just relaxing the client enough to make careful, smart decisions. Harris says that sharing more than just the insurance forms on his desktop helps build a rapport.

"I can talk about my family or my son, they can see pictures, so you can form a bond that way," he says.



Controlling the Sale

Mikogo immerses the client in the presentation, and lets the agent make his best pitch.

"Using Mikogo allows you to control the sale in a conceptual way, meaning you are directing what the prospect is seeing during your presentation," Miller says, "which allows for an easier transition to close the sale."

"It also allows me to cross sell," says Harris. "I can show them the multiple products, and clients can choose additional insurance coverage in which they see value." This, he says, increases the chance they'll keep more of his offerings on the table.



"The technology is fantastic and has allowed me to expand my sales territory into other states as well."

- GARY MILLER, INSURANCE AGENT, US HEALTH GROUP

The Easy Way

Because they're dealing with individuals and small-business owners who generally don't use desktop sharing software, Miller and Harris both say they value Mikogo's ease of use.

"Some of the other desktop sharing programs I have used have been more complicated for the prospect," Miller says. "The easier, the better!"

Miller, based in Florida but now covering other states as well, says his entire practice relies on Mikogo's ability to bring clarity and personalization. "All my sales presentations are done from a remote location," he says, "so I use Mikogo 100 percent of the time."

"I only see about 10 percent of the folks I write in person," Harris says, citing Mikogo as a major competitive advantage. "I can sell over the phone, but if I can invite someone into a Mikogo session, I block out the competition right away."



More information at www.mikogo.com/customers