“Many agencies recognize the professionalism and knowledge of Account Managers and CSRs who successfully weave sales into their day-to-day responsibilities. Please summarize the sales training (if any) you’ve received from your agency or company and discuss what you believe are the three (3) most effective sales techniques or tools that make you a better Account Manager/CSR.”

Haylie’s Winning Essay

Like many others I’ve met in this industry, I didn’t necessarily expect to have a career in insurance, but my business skills and desire to help people led me here. I gained basic insurance knowledge from my first full time employer, and began to understand that I was part of a very impactful industry. My desire to reach more people and develop my skills led me to M3 Insurance where I moved from Administrative Assistant to Account Manager in three years. I interact with numerous clients each day, and the sales techniques that have become a normal part of my daily interactions have made me a valuable member to the Senior Living and Social Service (SLSS) team at M3.

My sales training has increased over time, most of it coming from a close partnership with the Account Executives on our team. We lean on each other daily to identify coverage gaps, find proper markets, and enhance existing coverage for our clients. This collaboration leads to team wins where we share in the success. Our focus is always delivering excellent service to our customers, and for me, I’ve learned a lot from the sales team about understanding the clients’ specific needs by putting myself in their position. It’s easy to regurgitate insurance jargon back to clients without context, but they need someone who can explain to them how various coverages directly affect their aging residents or clients with disabilities. In developing my sales training alongside the account executives, I have been able to distinguish myself from the competition by being responsive, being knowledgeable, and being a trusted advisor for our clients.

It might seem simple, but being responsive is the most common technique I use with my clients, and it is the foundation for all my relationships. This is how I build their trust on a continual basis, and win with them every day. I may not always have the answer, but I will always let them know where I’m at in the process, which makes them feel acknowledged and understood. I continually set expectations with clients regarding timeline on projects, and confirm their understanding at each step along the way so that we can cut down on any unnecessary back-and-forth that can decrease productivity. Clients trust that I can manage their needs in a professional manner, and won’t have to follow up with me on the certificate they require when applying for state funding. This allows them to focus on caring for their own clients.

Additionally, my industry-specific coverage knowledge sets me apart from other Account Managers. Clients that have operations in the Senior Living and Social Service industry often have complex needs because they serve so many different populations. Working as a unified team in the SLSS practice group at M3 means I am able to leverage our collective expertise to the clients’ benefit. I understand the coverages that are needed to keep their employees and residents protected. I also work with clients as they navigate the ever-changing rules and regulations imposed on their business. Having an understanding of how insurance and caregiving intertwine is what pushes my customer service to the next level.

Perhaps most importantly, I position myself as a trusted advisor. When a loss occurs and a client needs to file a claim, they should have a sense of relief knowing that they have the proper coverage in
place, and confident that I will handle their incident with care and understanding. My trustworthiness comes in part from my ability to take complex situations and simplify for clients. When I can explain their different coverage options and how to effectively transfer their risk through insurance, they are able to weigh their options and make educated decisions for their business. Identifying their needs and speaking to that point can make insurance less daunting and the relationship more enjoyable.

I utilize these sales techniques and continually strive to be a better resource for my clients every day. I understand that discussing insurance may not be the highest priority on their list, but when they come to me, they know that I am dependable, have the industry knowledge to support their unique needs, and provide reliable guidance for even their most difficult situations. When I am able to make a positive impact on their daily operations, I provide them the freedom to focus on their business and care for their clients.

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