



A 30-Year Partnership Built on Organization and Trust



How Benefit Team Insurance Services Has Relied on Act! to Power a Lifetime in Insurance

For more than three decades, William Cross, founder of **Benefit Team Insurance Services**, has built his insurance career alongside Act!. From the earliest days of managing paper leads to running a modern, multi-state insurance agency, Act! has remained a consistent and trusted part of how he works.

Serving small and mid-sized businesses across California, Oregon, and Washington, William specializes in employee benefits, including medical, dental, vision, life, and disability insurance. Throughout an industry defined by complexity and compliance, staying organized has always been essential.

Finding Structure in a Paper-Based World

William's relationship with Act! began in 1993, at the very start of his insurance career. At the time, technology was scarce, and sales representatives were handed stacks of paper leads with little structure or support.

Rather than accept the chaos, William took matters into his own hands and bought his own laptop and an off-the-shelf copy of Act!, and began his relationship with organized leads and sales insights then and there.

That early decision paid off. Act! helped him bring order to his sales efforts and stay focused on follow-up—something that quickly set him apart.



"Act! helped me organize my sales efforts early on, and that organization stayed with me throughout my entire career."



Growing with Act! Across Organizations

As William moved on to Blue Shield of California and later into a brokerage partnership, Act! continued to play a central role. At Blue Shield, he not only used Act! to manage his own work but also shared his success with leadership.

"I showed management how I was using Act! with my sales efforts, and they agreed to roll it out statewide."

The platform was customized to better support the insurance sales process, helping both management and sales teams work more effectively. Later, as William hired staff at a brokerage firm, he relied on Act! to synchronize databases and maintain visibility across the team.

By the time he launched Benefit Team Insurance Services independently in 2013, Act! was already deeply embedded in how he ran his business.

Running a Modern Insurance Agency with Confidence

Today, Act! remains the backbone of William's daily operations. He uses it to manage his calendar, organize industry contacts, and maintain detailed records on clients and carriers. Custom

fields allow him to capture critical insurance-related information, while notes store frequently accessed details needed to serve clients efficiently.

Act!'s task management capabilities are especially valuable in an industry where service obligations and compliance requirements are constant.

"The daily task reminders are very helpful, whether they're sales, service, or compliance related."

Everything flows through one system, giving William peace of mind and the ability to focus on building relationships rather than searching for information.

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Key Takeaways

- **A strong foundation from day one:** Act! provided structure at the very beginning of William's career, helping him organize leads and establish disciplined sales and follow-up habits early on.
- **Industry-specific flexibility:** Custom fields and detailed notes allowed Act! to be tailored to the unique demands of the insurance industry, including client benefits and compliance-related information.
- **Scales with business growth:** As William's roles evolved, from sales representative to partner to agency owner, Act! adapted seamlessly to support increasing complexity and responsibility.
- **A trusted long-term solution:** With more than 30 years of continuous use, Act! has proven to be a dependable platform that continues to deliver consistency, organization, and confidence over an entire career.

About Act!

More than CRM. Your total relationship solution.

Act! unites sales, marketing, and customer management in one intuitive platform to help you stay organized, attract new customers, and turn relationships into results.

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