

## Coverra Insurance Services, Inc.



LOCATION  
Wisconsin

SUCCESS WITH  
Broker Briefcase® Benefits and P&C,  
ModMaster® and MyWave Elements®

AGENCY PROFILE  
Predominantly P&C with a little on the  
benefits side; not in a large metro area but  
targeting larger accounts

### ROI FROM ZYWAVE

8 of agency's 10 largest accounts  
are thanks to Zywave solutions

### RESULTS

Broke into new,  
profitable industries

“We hardly wrote any trucking risks before 2009... Now three of our top 10 clients are trucking risks, including the single biggest account in the agency.”

## BACKGROUND

Coverra Insurance isn't located in a large metro area, but knows there is a lot of industry across the state of Wisconsin. With their Zywave tools, particularly on the P&C side of the business leading with workers' comp, they have no shortage of prospects regardless of their location.

## SOLUTION

Coverra takes advantage of ModMaster to support clients' workers' comp needs, Broker Briefcase to deliver safety and loss control solutions, and the MyWave Elements client portal as a key retention tool.

They've crafted their entire pitch around workers' compensation to pique a prospect's interest and get in the door. "We use the basic ModMaster reports with virtually every prospect we come across," said Jeff Ascher, producer at Coverra. "We talk about what the prospect's minimum mod is, to open their eyes to what they could be saving. Workers' comp represents the majority of premium for just about every business, yet there is such limited education on the client side."

Jeff shared that even the most basic ModMaster reports are usually more than a prospect has ever had explained to them regarding workers' comp and the mod. His agency has been very successful earning new business with this approach.

Once they have the business, they work to put into place various programs that help control the mod, such as loss control and safety programs, and post-claim management such as return to work and accident investigation. "We could not get by without access to Broker Briefcase," said Jeff. They pull the relevant materials from Broker Briefcase, then post to the MyWave Elements client portal.

"We've had great feedback on the Elements site as well. Clients are using it often," Jeff told us. When a new client comes on board, they train the client's employee(s) on the portal, then regularly post pieces relevant for that client's business.

## RESULTS

"Of our 10 largest accounts, 8 of them are new to the agency in just the last few years," said Jeff. "And those 8 accounts are thanks completely to our full Zywave strategy."

In addition, they've been able to expand their areas of expertise thanks to the industry-specific resources in Broker Briefcase. "We hardly wrote any trucking risks before 2009, partially because it is just so tough from a compliance standpoint," shared Jeff. "Now I can do the research in Broker Briefcase and have plenty of material to send the prospect – and now three of our top 10 clients are trucking risks, including the single biggest account in the agency."