

# Retention via HRconnection<sup>®</sup>:

How Ellison Christopher retained and protected key clients in a highly competitive market



## Meet Our Partner:

Meet Bryan, owner of Ellison Christopher in Texas! His book of business was being touched by different types of competitors. In fact, one of them was his largest account. He used HRconnection to stay competitive in an ever-changing benefits market.



Our Partner



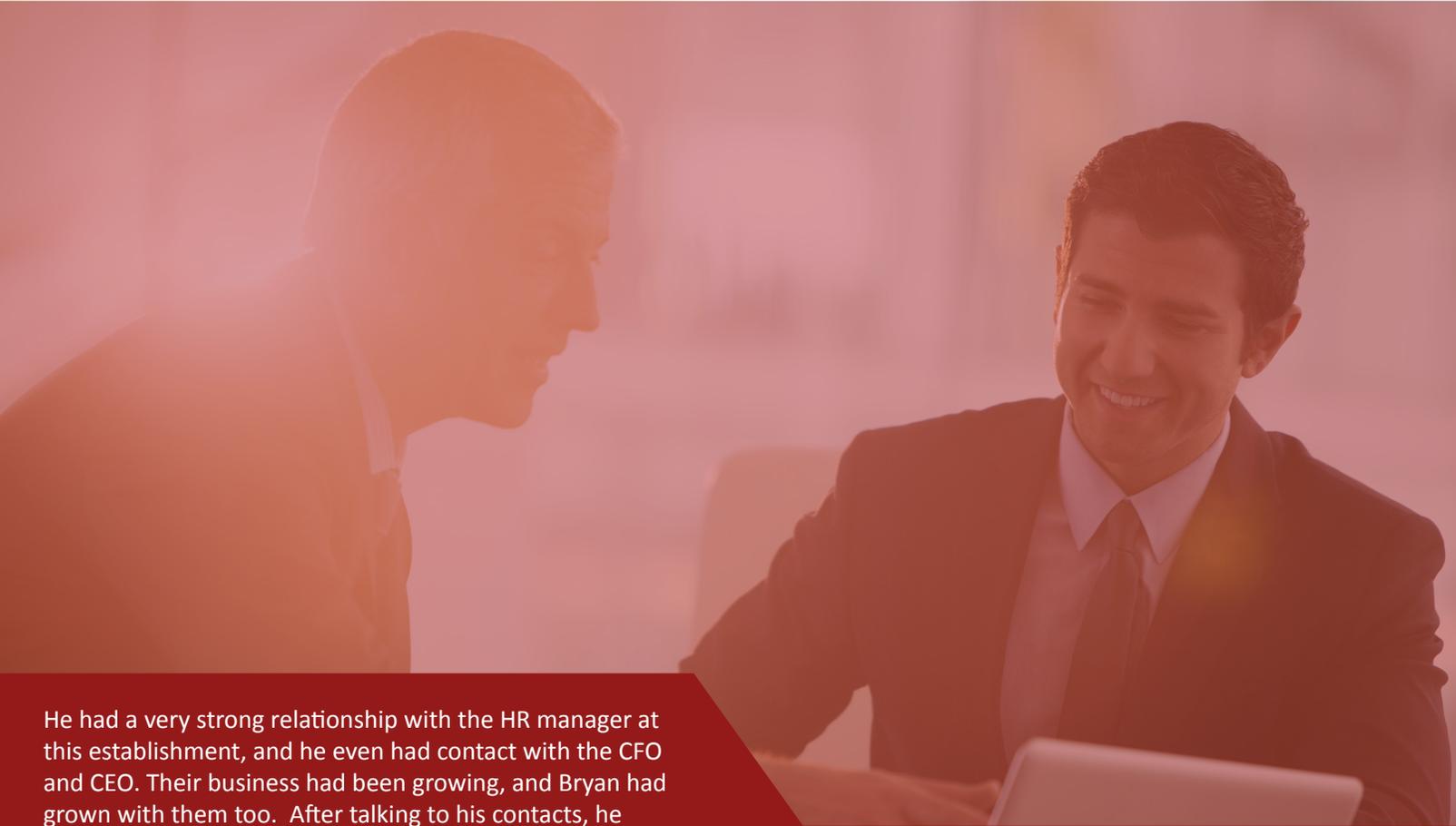
His Zywave products



[Zywave.com](http://Zywave.com)

## Why HRconnection?

When an agent of record (AOR) request letter came across Bryan's desk from one of the larger accounts in his book of business, he was confused.



He had a very strong relationship with the HR manager at this establishment, and he even had contact with the CFO and CEO. Their business had been growing, and Bryan had grown with them too. After talking to his contacts, he quickly found out that the current HR manager was finally retiring, and the new HR manager was looking to change brokers to gain access to online benefits services and materials. That broker competitor was backed by Zywave—but so was Bryan.

He knew that he could offer HRconnection, our HR and employee benefits portal. He connected with his remaining contacts at the establishment, and the CEO gave Bryan a chance to compete. This is where HRconnection comes in!

## Bringing on the HR Platform

Bryan has been working with Zywave for quite some time now. He knew he could count on HRconnection to give him the competitive edge, but needed to get it up and running for this large group fast. It was pressing for him; he knew he would lose the account without it. The obstacle? It was right in the middle of open enrollment. Bryan set up a meeting with the new HR manager and the CFO, and he retained the account with HRconnection.

However, he needed to rely heavily on Zywave's Partner Relations Consultant, Patti, to train him on the fly because of the time constraint during his busiest time of the year.

I leaned on Patti heavily to fill the gaps. She was amazing.

# Unmatched Support

Zywave's support after purchase is unmatched.

As a partner:

- Bryan had a dedicated training schedule and a team with the ability to get him up and running smoothly.
- He used our Partner Support team, who picked up the phone whenever he called.
- He relied on his personal Partner Relationship Consultant, Patti, who provided him with the immediate solution that he needed.
- He was able to set up short- and long-term disability, as well as rates, within HRconnection.



There were so many unique and complex issues that I had to deal with, and Zywave support was HUGE! The whole process wouldn't have worked and I wouldn't have been able to overcome my client's challenges without them.



## Beating the Competition

Not too long after Bryan dealt with the above competing broker, Bryan got a call from another account saying they were approached by a California-based tech company who was offering a ben admin system. They wanted to give Bryan a first chance to compete, but they were extremely interested in online benefits capabilities. Once again, Bryan ran a demo of HRconnection. Now able to compete, the tech company lost, and Bryan retained his account.

There was no break in commission — thank goodness. It was a tough situation, made better by Zywave. And now, everything is beautiful.

Stats thanks to  
HRconnection:



Bryan retained a combined



one from a competing broker and one from a tech company moving into the broker space.