

Elevating your game:

How Hall & Marose Silveus started going after six-figure accounts



Meet Our Partner:

Meet Lynn, vice president of sales and operations at Hall & Marose Silveus in Indiana! He wanted to move upstream and start winning six-figure accounts in premium and revenue. He knew he needed to bring more to the table than just the traditional service and price pitch that so many brokers lead with. His first step was to become a better producer and differentiate himself by investing in Broker Briefcase[®], and by leveraging the service and support teams at Zywave to help elevate his game.



Our Partner



His Zywave products



Zywave.com

Why Broker Briefcase?

Lynn wanted something that was going to take him from simply being a salesperson to being a technician—someone who researches, analyzes and speaks to the real-world issues of each client.

This is the way Lynn was going to:



Differentiate from the competition



Compete with larger agencies



Build an attractive and relevant value proposition

With more than 5,300 pieces of educational, informational and marketing content, Lynn relied on Broker Briefcase to give him that edge.

Stop Selling on Service and Price

Lynn hit a point in his career where he knew he needed to approach prospects with more than just the tired “service and price” pitch. Simply put, he needed to step up his game.

With Broker Briefcase and ModMaster®, Lynn has been able to position himself as a risk management expert. He is able to understand and talk fluently about niche markets thanks to the resources in Broker Briefcase. He no longer relies on carriers for informational and educational support. Instead, he uses Broker Briefcase content to proactively market and present to win business.

“If you sell to someone based on price, then they will leave you on price. I wanted to become an indispensable partner.”

Lynn’s value proposition went from tired and repetitive to unique, relevant, refreshed and impactful.

Competing with the Big Guys—and Winning

Broker Briefcase gave Lynn the confidence to go after the big accounts.



Lynn called a six-figure manufacturing account in Japan.



The first thing the president of the company asked: **What is your value proposition?**



It was the first time in 18 years of being an agent that Lynn was asked this, but because of Zywave tools, he was confident and ready.

He explained how their agency wasn't there to reinvent the wheel; he was there to bring more to the table outside of price and excellent service.



Lynn outlined all of the resources from Broker Briefcase that he could bring to the table. He solidified himself as a risk management expert.



Quickly after that he was given a shot at the account. Lynn, a one-man team competing against an agency 10 times his size with a team of five presenters, felt confident in what he had to offer because of his Zywave tools. **In the end, Lynn's presentation was not only comparable to theirs, but won him a huge part of the account.**

Attracting New Talent

There's a newfound excitement at Hall & Marose Silveus due to their Zywave tools. Gone are the days when all producers hand out is a business card that gets thrown on a desk. **Thanks to Broker Briefcase and ModMaster, agents now lead with how they can alleviate specific pain points that the client's current agents simply cannot accomplish.** The correlation: Zywave breeds confidence. It's what helps them attract new talent, something that has been plaguing them and the industry for quite some time now. They now have an attractive place to work because of the tools they deploy from Zywave.



Zywave is a game changer, I can say that with confidence. If you want to be successful, you need these tools. I preach that up and down.



People Make the Difference

You cannot be a first-class product without first-class people behind it. Lynn felt this from the start of his partnership with Zywave. With the help and guidance from his account executive, Marc, and implementation consultant, Kara, Lynn has experienced continued success with Broker Briefcase and ModMaster.



I feel blessed to work with a company that actually backs up what they say and the product. I consider Marc and Kara my friends, I cannot say enough about them. I would be more than happy to make a sales call for them for any agent who is on the fence about coming on board with Zywave.

Stats Thanks to Broker Briefcase:



In just 12 months, the agency's top three producers—who were also the highest utilizers of Broker Briefcase—significantly impacted agency growth.

\$1mil

in premium

\$125K

in revenue



Hall & Marose Silveus **beat out an agency 10 times its size** to win a large account.

\$100K

in premium

\$13K

in revenue