

Home Loan & Investment Company



LOCATION
Colorado

SPECIALTY
Combination of clients with a P&C and Employee Benefits focus

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

“ I can't see us working without Broker Briefcase. The resources keep us and our clients updated on what's changing. ”

DIFFERENTIATION

Have established themselves as experts on the ACA.

SIDE NOTE

Address top client pain points with resources such as the Safety Manual.

CHALLENGE

When a current client of Home Loan & Investment Company (HLIC) approached the agency for specific resources on a variety of topics including OSHA, loss control, and workers' comp, the agency didn't have a solution. After searching for the right fit, they found Broker Briefcase.

Not only was HLIC able to provide specific resources for their P&C client base with Broker Briefcase, but also to their employee benefits book of business as well, which has allowed the agency to establish themselves as experts on the Affordable Care Act.

SOLUTION

Now HLIC leverages a wide range of resources available in Broker Briefcase, and can brand those resources back to their agency with simple merge field customizations. For example, producers at HLIC proactively have conversations with their current clients and their prospects focused around resources such as Safety Manuals and providing them the resources to update current manuals – a huge pain point for safety managers and business owners.

Broker Briefcase reaches beyond their P&C clients and also focuses on employee benefits. HLIC's benefits specialists take advantage of the vast library of content that is always being updated with new Health Care Reform documents and campaigns to provide valuable information to their clients as soon as changes occur.

HLIC also leverages the use of their highly customizable MyWave Elements client portal in many ways. A favorite use for clients is the ability to track their OSHA incidents online. This online client resource allows yet another point of contact for HLIC to reach out to their clients on a regular basis with resources that matter to them.

RESULTS

With Broker Briefcase, HLIC producers and staff have set up ongoing campaigns to stay in front of clients and prospects effortlessly and position their agency's expertise.

Since Broker Briefcase has been established at Home Loan & Investment Company, they have been able to support vital P&C needs, and establish themselves to clients and prospects as the experts on the Affordable Care Act.