

SDL Brokerage, Inc.



LOCATION
New York

SUCCESS WITH
Broker Briefcase*

AGENCY MAKEUP
P&C and Benefits; 20 employees,
3-4 dedicated producers.

ROI NUMBERS

\$300,000 in premium
(4 new accounts) in less
than 3 months



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PAYBACK PERIOD

Broker Briefcase paid for itself before
SDL was even finished training

CHALLENGE

SDL's clients have primarily been on the group health side, with some P&C business mixed in. In the wake of health care reform, they were looking to grow the P&C side of their business. "We have clients anywhere from \$5K to \$500K in premium, but we could never really play with the 'big boys,'" said Ken Jones, a P&C producer at SDL.

SOLUTION

By adopting Broker Briefcase, Ken and his colleagues saw an opportunity to play in a larger arena and gain opportunities that formerly would have been seen as "pretty far-fetched." "Now with Zywave, we can play in that \$1 million arena," said Ken.

RESULTS

Soon after he started with Zywave, Ken had four big opportunities that would likely have been out of reach in the past. He wasn't able to get more competitive pricing, so he led with Zywave solutions.

"We went in with the Zywave safety campaigns, a custom safety manual, and won three of the four accounts – all on BORs. In my 30-year career, I can practically count on one hand the number of BORs I've won, and I walked away with three of them in three weeks, just using Zywave."

Ken's favorite piece for prospecting is the customizable Safety Manual.

"You put the prospect's logo on the front, present it and say, 'This is the type of thing we do for our clients. You can distribute it to your employees and have them sign off on it, then we bring it to the underwriter to lower your risk profile and help negotiate a better rate.' Prospects are blown away."

On either side of the business, Ken loves how easy it is to find relevant materials. "Just go with their hot buttons. I recently had an opportunity for a 150-life group, and one of their biggest pain points was HR. I printed out a sample SPD and she loved it." He has done the same with the P&C groups he sold: simply typed their industry or pain point into Broker Briefcase (e.g. "contractor," "real estate"), and printed out some impactful resources to take to the meeting.

Ken's agency owner used an interesting tactic to help him feel invested in the new system. He sent Ken to Partner Certification training at Zywave headquarters in Milwaukee – and he made Ken pay his own way. "I felt I had some skin in the game now, I felt invested," said Ken. "And I definitely feel the class has paid for itself already, by putting those best practices to use."