

## Shenandoah Valley Group



**LOCATION**  
West Virginia, Pennsylvania

**SUCCESS WITH**  
HRconnection®, MyWave Elements®, BrokerageBuilder™, Broker Briefcase® - Benefits

**CLIENT MIX**  
Small and large group, in the public sector

“The ease of use was the selling point. My clients don’t have to be computer programmers to use these products.”

### ROI FROM ZYWAVE

Has won 7 new accounts in one year using Zywave solutions

### RESULTS

Uses fee-for-service model for HRconnection and Elements administration

## BACKGROUND

Shenandoah Valley Group is a two-man operation with David Barton at the helm. David is the sole producer, and he recently hired on another person to handle work associated primarily with getting HRconnection portals up and running. Wanting to retain an edge in a unique West Virginia health care market (West Virginia has run their own state health insurance program by county for over 30 years and has struggled to get in compliance with provisions of the Affordable Care Act), David purchased several Zywave solutions one year ago, after looking at multiple vendors. “The ease of use was the selling point,” says David. “My clients don’t have to be computer programmers to use these products.”

## SOLUTION

David determined that in working with public entities, one of SVG’s key markets, HRconnection is an important tool, as many public employers do not have county-wide email systems to effectively disseminate information to all of their employees. Information is given to some employees, or in some cases, is missed completely. “With the amount of information that these public entities need to get out to their employees about the Affordable Care Act to remain transparent, a system like HRconnection that houses all information in one place is almost a necessity,” says David.

## RESULTS

Based on David’s expertise of compliance and with the help of Zywave tools such as the content in Broker Briefcase, a centralized system like HRconnection and a MyWave Elements portal that employees can access at any time, he has won seven new accounts in just one year, including a 300-life account and a 1,000-life account. “Most brokers aren’t doing anything to help their clients be in compliance with the Affordable Care Act and Department of Labor. I am giving them what they need.”

Because of the value associated with both the HRconnection and MyWave Elements portal sites, David uses a fee-for-service model and charges each account per employee, per month. This has been successful for him, and clients are willing to pay the fee because it keeps them in compliance.

His favorite tool in Broker Briefcase is the DOL Audit Toolkit. “I have won business by just showing clients the Toolkit,” David says. “It scares the bejesus out of them, seeing what they may not be in compliance with.”

Given the success he has seen in his area, David has not had to prospect - new clients have come to him through word-of-mouth referrals. “People are looking for an advisor to help them through the changes, and if we can give that to them, they are happy,” David says.