

All About Insurance



LOCATION

Chapel Hill, North Carolina

AGENCY FOCUS

Personal lines, Property & Casualty

SUCCESS WITH

Broker Briefcase® Property & Casualty Edition, MyWave Connect®, ModMaster®, HR Hotline

“After 10 minutes of the demo, I was sold. Seeing Broker Briefcase and all the safety and OSHA documents it has — those were some of the things I knew could make us a differentiator in the marketplace.”

— Mick Hunt,
Chief Operating Officer

BACKGROUND

All About Insurance (AAI), founded in 1993, is a full-service agency based in Chapel Hill, North Carolina, with 10 locations serving 30,000-plus clients across seven states. AAI is primarily a personal lines agency with a growing P&C business. It's also Nationwide Insurance Company's largest agency.

AAI needed to level the playing field. When Mick Hunt joined the company as its Chief Operating Officer, he had two goals. With a background in commercial accounts, Hunt knew he wanted to expand and grow the company's commercial portfolio. He also wanted to pursue some of the large, small and midmarket accounts owned by bigger brokers. “We wanted to be able to play in that field quite frequently,” he said.

SOLUTION

Before he learned about Zywave, Hunt said he and his producers were going into meetings with fingers crossed, hoping they could beat the incumbent's price. But after seeing a demo of Zywave's suite of marketing communications resources, analytics, client resource portals and agency management tools, he knew he had found a solution.

“After 10 minutes of the demo, I was sold and ready to go,” Hunt said. “A lot of agencies in the marketplace aren't talking to their customers or prospects about safety, return to work or OSHA training. Most of the time I knew I could come in with a similar price or beat their price, but now I have other tools that I can bring to the table with me.”

With Broker Briefcase P&C Edition, MyWave Connect, ModMaster and HR Hotline, Hunt and his team of about 50 employees now have a range of tools that help them win new business, retain current clients and clearly demonstrate value-added services. Resources like the Prospect Presentation Creator and industry-specific content (both found in Broker Briefcase) have changed the conversation from meeting clients' basic needs to becoming a trusted advisor and partner.

RESULTS

Using Zywave solutions, AAI has grown their commercial book of business and increased their closing ratio nearly 15 percent. Hunt said AAI won seven accounts by demonstrating how Broker Briefcase helps to reduce OSHA violations through training materials, a violations database, recordkeeping tools and more. AAI retained its largest account by helping the client reduce their X-mod in workers' compensation and by giving them access to Broker Briefcase tools. “They were extremely grateful for those items,” he said.

Hunt said Zywave's solutions have empowered producers to stay informed, and the tools available to them are filling service gaps and helping win accounts. Broker Briefcase's three-minute Prospect Presentation Creator is one feature that gets a lot of use.

“It's been amazing,” he said. “Even before we meet with the prospect and provide a quote, the Prospect Presentation Creator allows us to pull content relevant to their pain points in minutes. We're having in-depth conversations about risk management. We're having conversations about OSHA. Those are things that we could not have done before without having a dedicated content team or devoting extra hours we don't have. It's definitely an eye-opener.”

Now, about 70 percent of all client presentations are enhanced with world-class solutions from Broker Briefcase or ModMaster. These industry- and client-specific solutions help AAI demonstrate why they're a thought leader in the insurance industry and the unique problems they can help their customers solve. ModMaster, in particular, gives clients an “a-ha” moment, he said, showing them the amount of money they could be investing into or saving their business by getting their losses under control.

Through Zywave's solutions, AAI has increased their closing ratio nearly 15 percent. AAI retained their largest account by supercharging their value-add and won seven new accounts by demonstrating a single tool in Broker Briefcase. Producers are more motivated knowing they have additional resources to demonstrate their expertise and help close deals.

RESULTS

Using Zywave solutions, AAI has grown their commercial book of business by empowering producers to stay informed, and the tools available to them are filling service gaps and helping win accounts.

ROI FROM ZYWAVE

Increased closing ratio nearly 15 percent; retained largest account; won seven accounts by demonstrating OSHA compliance features.