

World Insurance Association, Inc



LOCATION
Georgia

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

AGENCY MAKEUP
Full service, offer all lines of
coverage and technology offerings
on an a la carte basis

“We want our clients to have the latest and greatest resources to differentiate ourselves from others.”

SIDE NOTE

Changing the culture: Everyone in the company is working with Zywave in some way

CHALLENGE

We spoke to Michelle Sutter, who manages the employee benefits division at World Insurance Association. When they made the decision to purchase Zywave solutions, they recognized the ever-changing benefits landscape and wanted access to technology to best support client needs. “We need to know that we are providing relevant value to our clients via access to the latest and greatest tools, without breaking the bank,” Michelle said.

SOLUTION

WIA started out with Broker Briefcase, BrokerageBuilder and HRconnection in 2008, then added the MyWave Elements platform later. “Now we have the tools where every client that comes to us can have those added benefits, and it’s something we can manage in-house, rather than having to manage another vendor,” said Michelle.

RESULTS

Michelle shared quite a few examples of the success their agency is seeing due to Zywave solutions; here are just a few:

- **Greater efficiency:** BrokerageBuilder helped them put a process in place for employees, to streamline daily workflows and activities, improve efficiency in handling customer service calls and enhance organization. “It’s nice to manage all our data in one place, versus the paper files of the past. And, with the goal of working at peak efficiencies, we can now track the history of a claim, supervisors can track and manage employee activities electronically via multiple offices with everyone having real-time information at their fingertips, along with tracking sales and commissions. From A to Z the Zywave systems have us covered,” said Michelle.
- **Enhanced prospecting pitch:** The combination of Broker Briefcase and MyWave Elements has had a powerful impact on sales. “We’ve had very positive feedback from our recent Elements rollout. We have found the system easy to manage and have truly enjoyed the ability to now provide more robust demo sites to our prospects.” She also shared that they’ve found great value from the health care reform content in Broker Briefcase. “We’re providing top ACA content at our renewal meetings, and using the health care reform toolkits as a prospecting leave-behind. It’s been very effective for our team.”
- **A big win:** Right as WIA was going live with Zywave, they were working on closing a new deal in which the prospect had said, “If you want to be our broker, you need to have HRconnection.” When the old broker found out he was losing the business, he shut off the client’s HRconnection portal that day (a Friday). WIA was able to re-build an identical HRconnection site for use by Monday morning – proving to their client they had made the right decision!