

## Case Study

### Partner:

Integrity Employee Benefits and Insurance Services, Inc

**Location:** California

### Success With:

Sales Cloud, Content Cloud & Zywave Learning

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*The training you get is amazing. Every team member wants to make sure you're getting the most out of your tools. I have other vendors I need to chase down. But with Zywave, I know I can email any number of people and quickly get the answers I need. You truly walk your talk."*

*— Diana Twadell, owner of Integrity Employee Benefits and Insurance Services*

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## Background

Integrity Employee Benefits and Insurance Services, Inc. is a small, one-person shop run by Diana Twadell. Diana spent more than 20 years working for a very large brokerage, but felt like she needed a change and decided to go out on her own. She knew that in order to compete, she would need to invest in the right technology.

## Solutions

After consulting with Zywave's tech experts, Diana chose the Sales Cloud, Content Cloud and Zywave Learning.

## Results

After partnering with Zywave, Diana saw an immediate positive impact on her business, especially when it comes to time-savings, prospecting and providing superior customer service.

"With Zywave, I feel like I have a team behind me. I used to have assistants and teams of people to help with things like compliance, wellness, benchmarking, etc. But now, I can deliver all that and more—on my own—easily with the Zywave tools," said Diana.

In particular, Diana has seen early wins with the benchmarking and benefits booklet builder tools in the Sales Cloud. "A member of my team used to spend 2-3 hours on each benefits booklet. The fact that I can put something together that's branded in just a few minutes is phenomenal."

Furthermore, the benchmarking tool has been extremely helpful in showing prospects how they stack up in terms of plan offerings and contributions. "The benchmarking report is very easy to understand, which is critical, because if clients can't quickly understand it, it's worthless. And this is something a lot of other brokers aren't offering."

In addition, Zywave Learning has proven to be a great prospecting tool, especially with California's mandated sexual harassment prevention training. "It's an easy hook and it's a great value add for clients. It's an easy way to make extra money while getting in the door and meeting more decision-makers."

All of which has helped Diana deliver on her agency's mission: to empower businesses and inspire their employees. And with the Zywave tools in her pocket, she's able to do just that.