

Case Study

Partner:

Beneficial Solutions

Location:

Naperville, IL

Brokerage Focus:

Employee Benefits
HR Services/Consulting
Wellness Programs

Success With:

Sales Cloud
Client Cloud
Content Cloud

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“The content. I just can't say enough about the content. The content is timely and gets the job done.”

— Rick Aspan, Senior Human Resource Business Partner

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Background

Since 1991, Beneficial Solutions has been working with small and mid-sized firms to build robust employee benefits packages. Rick Aspan joined Beneficial Solutions after 15+ years in the corporate HR world, with the goal of helping advance Beneficial Solution's mission of being a trusted partner who brings greater value to the broker-client relationship. Rick quickly recognized the potential of Zywave's solutions and realized they needed to get more out of their products.

Solutions

Beneficial Solutions decided to upgrade to several of Zywave's Clouds—Content Cloud, Sales Cloud and Client Cloud—to bring increased value to their current clients and attract new prospects through enhanced lead generation and email marketing automation.

Results

Recognizing the value of Zywave's solutions, Rick and his team decided to move from using only a few of Zywave's individual point solutions (such as HR360 and HR Hotline), to investing in Zywave's Clouds to leverage a more robust suite of solutions to grow their business.

In fact, Rick believed so much in the need to expand how they worked with Zywave, that he volunteered to cover the costs himself in order to get the buy-in he needed. In the first 3-4 months alone, the solutions paid for themselves and Rick was able to prove their value as an ongoing revenue stream.

Numbers

Since investing in Zywave's Clouds, **Rick has been able to recoup his investment in just 3-4 months**, and create a whole new revenue stream by implementing a tiered fee-for-service model.

Cloud Solutions



Sales Cloud

Uncovering new business was a top priority for Beneficial Solutions. Rick dove into the Sales Cloud and quickly assembled marketing campaigns full of timely, relevant benefits resources. The Sales Cloud provided Rick and his team with the platform they needed to streamline their marketing and lead generation process. Using the Sales Cloud, they were able to identify and market to new leads, quickly coordinate email communications, and deliver relevant content to clients and prospects.

Rick noted that using the Marketing & Prospecting tools in the Sales Cloud has allowed Beneficial Solutions to more easily get in the door with new clients. Within about six months, he sent over 17,000 emails, with open rates as high as 42%. Rick's emails significantly exceed industry standards, with the average open rate being around 17% for all industries in the United States.

Those great open rates are just the start for Rick and his team. They use additional stats from the email marketing analytics dashboard in the Sales Cloud to uncover what people are interested in and then further craft their outreach strategy for those warm leads. "I track stats like no one's business. Monitoring your results is really crucial once you start this. I'm constantly looking at the email marketing dashboard to see what people are interested in and what's getting the most draw," added Aspan. This all leads to a lot of new eyes on their business and better engagement once the meeting is set.

In addition to growing their core business, Rick and his team have leveraged the Lead Generation database within the Sales Cloud to identify ideal contacts to further build their pipeline. Uploading these contacts into their Agency Management System has allowed him to build new contact lists for their email marketing campaigns and engage more prospects. "We are just scratching the surface on the lead generation tools, but they're already providing great value," Aspan noted.

Cloud Solutions



Content Cloud

By combining elements of the Sales Cloud with the Content Cloud, Rick has a one-two punch that he can use to deliver timely resources to clients and prospects. The content has helped Beneficial Solutions deliver valuable expertise and position their agency as a trusted advisor to their clients.

The variety and quality of the content, including videos, wellness resources and more, keeps clients and prospects coming back for more. "I just can't say enough about the content. The content is timely and gets the job done," Aspan said.



Client Cloud

Finally, Rick has harnessed the power of the Client Cloud to further differentiate his business model and offer additional value-added services as part of his tiered fee-for-service model. As part of this model, Rick was able to leverage training courses inside Zywave's Learning Management System (LMS) to help a number of clients meet mandated sexual harassment prevention training as required by the state of Illinois. Since this is an annual requirement in the state, offering these courses digitally has helped him add value to existing client relationships and create a unique prospecting hook for potential new customers.

Furthermore, using the Client Portal, Rick has been able to easily serve up relevant content for his clients so they can self-serve more of their insurance and HR-related questions. This has helped Beneficial Solutions become highly integrated into their clients' operations and increase account stickiness, ultimately helping to improve retention.