

Case Study

Partner:

Wilson Partners Group

Location:

Michigan

Brokerage Focus:

Employee Benefits

Wellness Consulting

Success With:

Client Cloud

Content Cloud

Sales Cloud

Background

Wilson Partners has a history of over 35 years of employee benefits and employee health and wellbeing market experience, working with Fortune 500 employers, health systems, communities and states. They service a wide range of group sizes, from 50-5,000+. Keeping content updated and compliance information at the ready for clients was an essential, but time-consuming task, and required a more efficient long-term solution.

Solutions



Content Cloud/Broker Briefcase

According to Matt Schoeppe, Senior Consultant, Broker Briefcase was the tool that first attracted Wilson Partners to Zywave. It had exactly what they needed: timely content and lots of it. From regular compliance updates to ever-changing content regarding everything from open enrollment to the pandemic, Wilson Partners now had an effective way to deliver this critical, and sometimes time-sensitive, information to clients. Once they saw the value of the Broker Briefcase content, they knew moving to the full Content Cloud could provide even more benefits.

"It is so easy to go in to the Content Cloud and find something relevant to send to clients. By having the ability to simply search, click and send, we had more time to focus on servicing our clients and increasing our marketing, sales and data analytics efforts." noted Schoeppe.

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*- Matt Schoeppe
Senior Consultant*

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[More solutions](#)

Cloud Solutions



Client Cloud

The content from the Content Cloud was just the start, Matt and team realized that clients want more. More information. More communication. More technology-on-demand. So, the next step included adding the Client Cloud and to immediately implement the Client Portal. Matt believes, "The Client Portal is a must-have at this point, based on the feedback we get from clients. Clients want online access to information. It's a way to get clients access to the things they need, when and where they need it."

Additionally, the Client Cloud provided Wilson Partners with a new resource that they had historically not offered—online education and training, made possible through the Client Cloud's Learning Management System (LMS). With the LMS, Wilson Partners can help their clients offer training to meet compliance requirements and more. This allowed Wilson Partners to offer yet another value-add service to further enhance the customer experience and also attract new prospects along the way.



Sales Cloud

Offering more to the clients was a top goal. Another priority was prospecting and closing new business. Zywave's Sales Cloud brought prospecting and email marketing right into their hands. Matt and team began to use the leads database within the Sales Cloud to identify and learn about prospective clients. "With the Sales Cloud, we can get a lot more information before talking to a prospect. For instance, we can see if they have a history of 5500 violations or if brokers are charging very high commissions. We can find out what they are missing right away," says Matt. Using the leads database provides them with a way to make cold calls and emails a little bit warmer. In addition, the email marketing automation capabilities have made it even easier for Wilson Partners to get in front of the right prospects with the right information.

Results

Matt and team have experienced extensive time savings with Zywave's tools. The Content Cloud provides value in both the time saved sourcing information and writing accurate and timely content, especially when communicating critical compliance details. Matt estimates they easily save at least 4 hours each time they need to send a compliance update. And lately, with the pandemic and new administration, there have been a lot of compliance updates impacting the insurance world.

As time goes on, Matt expects to see even more time and dollars saved as they continue to rollout more client portals and email marketing campaigns to the new leads identified through Zywave's solutions.

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