Quoting & Proposals (CPQ)

Within Zywave Sales Cloud

The Employee Benefit industry's leading integrated solution that will transform every step of your quoting and proposal process.

Are you confident in presenting the right plan options?

Gathering plan data and analyzing, and comparing it can be complicated and time consuming. Execute all these processes within one platform that will give you a strategic advantage.

Tired of waiting on pricing from carriers?

Wait no more. Access rates from numerous carriers for multiple plan options in seconds. With direct connections to carriers, no need to worry if you have the most up-to-date data.

Spending too much time creating unique presentations?

Creating the perfect presentation can take you away from other tasks. Simplify your presentation creation process without sacrificing quality, data or branding.
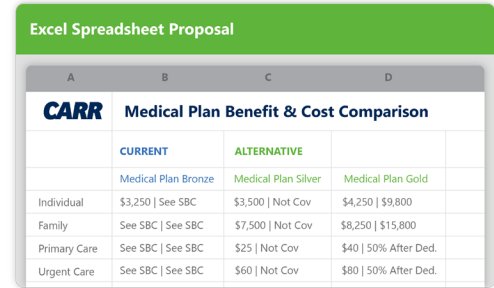
Configure

Identify the right carriers and the right plan designs to meet the unique needs of each of your employers. Uncover where they struggle with their benefit plans and use data-rich insights to identify opportunities.

- Account Management
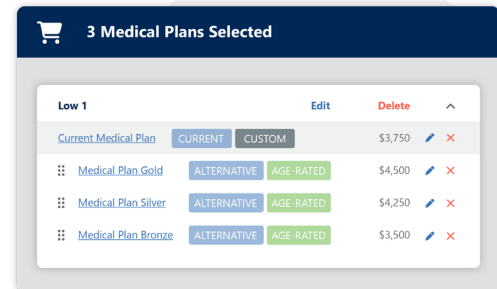- Medical Plan Comparison Chart - Small Group

Excel Spreadsheet Proposal

	A	B	C	D
CARR		**Medical Plan Benefit & Cost Comparison**		
		CURRENT	ALTERNATIVE	
		Medical Plan Bronze	Medical Plan Silver	Medical Plan Gold
Individual	$3,250 | See SBC	$3,500 | Not Cov	$4,250 | $9,800
Family	See SBC | See SBC	$7,500 | Not Cov	$8,250 | $15,800
Primary Care	See SBC | See SBC	$25 | Not Cov	$40 | 50% After Ded.
Urgent Care	See SBC | See SBC	$60 | Not Cov	$80 | 50% After Ded.

Price

Instantly access pricing from the entire market with one census upload, no matter what plan designs your employer requires.

- Carrier Direct ACA Quoting
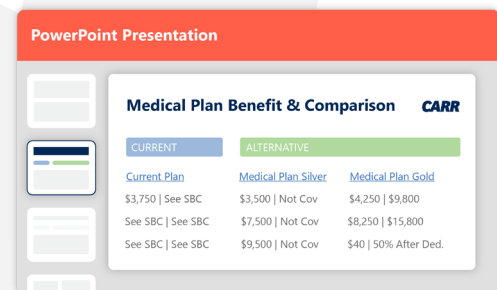- Small Group Quoting and Proposals

🛒 3 Medical Plans Selected

Low 1			Edit	Delete	^
Current Medical Plan	CURRENT	CUSTOM		$3,750	✎ ✕
⠿ Medical Plan Gold	ALTERNATIVE	AGE-RATED		$4,500	✎ ✕
⠿ Medical Plan Silver	ALTERNATIVE	AGE-RATED		$4,250	✎ ✕
⠿ Medical Plan Bronze	ALTERNATIVE	AGE-RATED		$3,500	✎ ✕

Quote

Deliver quotes to employers within proposal presentations that are professional, custom and created in minutes.

- Custom Agency Branding
- Enrollment Booklet Builder
- Interactive Modeling

PowerPoint Presentation

Medical Plan Benefit & Comparison **CARR**

CURRENT	ALTERNATIVE	
Current Plan	Medical Plan Silver	Medical Plan Gold
$3,750 | See SBC	$3,500 | Not Cov	$4,250 | $9,800
See SBC | See SBC	$7,500 | Not Cov	$8,250 | $15,800
See SBC | See SBC	$9,500 | Not Cov	$40 | 50% After Ded.

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