

Case Study

Partner:

Sahouri Insurance

Location:

McLean, VA

Brokerage Focus:

Full-service,
commercial,
employee benefits,
personal, life & disability

Success With:

BrokerageBuilder

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“BrokerageBuilder has made renewals 100% more efficient.”

*– Jodee Aquino,
Sahouri Practice Leader*

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Background

For over 50 years, Sahouri Insurance has been an insurance staple in the D.C. metro area. Providing clients with excellence by managing all insurance needs—commercial, employee benefits, personal, life & disability, and more. Their goal is to make insurance simple. To enhance their efficiency internally and externally, Sahouri turned to Zywave’s BrokerageBuilder.

Solutions

After experiencing some inadequacies with their existing agency management system (AMS), Sahouri needed a better tool; enter BrokerageBuilder. Their previous AMS was designed for P&C, and while it worked well for that function, it was lacking features for the employee benefits side of the business. According to Jodee Aquino, Sahouri Practice Leader, the need for enhanced workflow management options and ways to streamline the RFP process were the main reasons for the switch to BrokerageBuilder. Sahouri had already been using a few other Zywave offerings and decided it was time to add more.

Results

Time savings and ease of use top the list of benefits that using BrokerageBuilder has produced for Sahouri. Jodee enjoys how easy it has been to learn and use the system. According to Jodee, “The system is very intuitive and there is not a lot of training required, even for admin usage.”

Additionally, new clients are impressed with the output from BrokerageBuilder like the Benefits Guide and customized proposals. The team knows the increased efficiency and custom features will allow them to deliver an even better level of service and support.

While the Sahouri team is just starting to scratch the surface of all the functionality within BrokerageBuilder, they can

[More results](#) >

Results (cont.)

already see how things like customized reports, task assignments, workflow management and streamlined RFP processes are a win. BrokerageBuilder has made them 100% more efficient in renewals. Also, the ability to create account opportunities and assign related activities has been extremely beneficial to the team.

After realizing the time saving and efficiency they can experience with BKB the Sahouri team is looking forward to leveraging it to help grow their benefits business to drive better results for their agency. Also, they can't wait until renewal season rolls around again; they will be ready.