



Kurt and Zywave  
team up to **WIN**  
**NEW BUSINESS AND**  
**RETAIN CURRENT**  
**CLIENTS.**

## INTRO:

Meet Agency Owner Kurt Buursma from the Buursma Agency! He has a wide array of benefits tools from Zywave that help his small agency in Holland, MI compete with the big guys—and win. We break down exactly how each of his tools impact his business on a daily basis, and give some insight into exactly why and how he wins with Zywave.

**ZY**WAVE

Zywave.com

**BUURSM**  
**AGENCY**  
INDIVIDUAL & GROUP | HR SUPPORT | WELLNESS

Our Partner

- BB** Broker Briefcase®
  - HRH** HR Hotline
  - PDB** Plan Doc Builder®
- Their Zywave Products

## Why Zywave?

Kurt lost a prospective client. The reason? They went elsewhere because they felt the other company had a “larger backroom,” meaning more resources to better meet their service needs. Kurt was already evaluating technology vendors at this time, but this was the final straw. We’re happy to say he ended his search with Zywave.



“There were a lot of options out there for insurance technology, but none of them rose to the level of Zywave. Other tools and services just couldn’t compare.”

## What’s the ROI?

Thanks to his Zywave tools, Kurt has **won and retained** numerous accounts. Kurt attributes Broker Briefcase, HR Hotline and Plan Doc Builder to winning him the last two accounts.

**80**-life group

**190**-life group

(now expanding to 300 by the end of the year!)

“There’s no question that I have seen ROI in both **winning new business and retention** with my Zywave tools. Purchasing Zywave tools was an investment, especially for a small brokerage like mine, but it’s been worth it and I couldn’t be happier.”



# How Kurt wins with Broker Briefcase®

Kurt uses Broker Briefcase Benefits Edition (BBBE) in a number of ways to win new accounts, retain his current clients, and train and educate his staff.



## WINNING NEW ACCOUNTS

Kurt sends automatic email campaigns and newsletters to more than 150 people to show the value and industry expertise his agency can bring. Prospects are universally impressed and engaging on a regular basis.



## RETAINING CURRENT CLIENTS

Kurt uses BBBE to develop a stewardship report during renewal season, displaying everything he's done for his clients and the value he delivered all year long.



## TRAINING AND EDUCATING

One of Kurt's favorite things about BBBE is the training and educational resources that help him and his agency stay on top of their game in an industry that can seem overwhelming.

**Here's an insider tip: Kurt will seek out information for his own knowledge, such as the FMLA guide.** After educating himself, he then turns around and gives that same guide to his clients—branded back to his agency!

“We aren't a large agency, it's me and two others. Zywave tools allow for my clients and prospects to see us as a much larger company with large back room capabilities.”

The people answering HR Hotline are amazing. I can't imagine how they keep up with the array of things going on in the industry. I'm most impressed with how detail oriented each answer or solution is, and the speed at which I receive information back. **THOROUGH, TRUSTWORTHY AND ACCURATE:** that's HR Hotline.

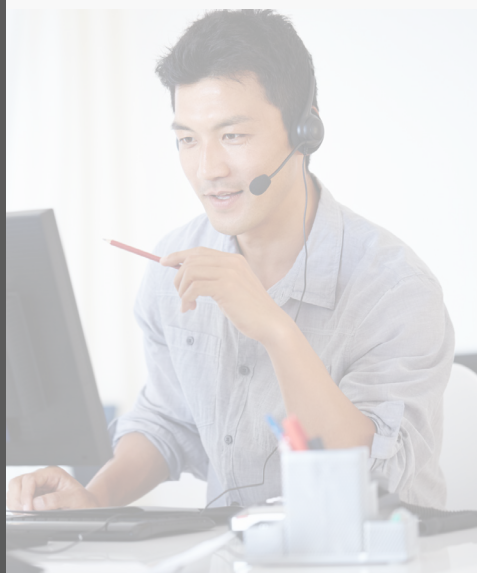


## How Kurt wins with HR Hotline

Brokers are expected to be trusted advisors in legal developments, compliance and human resources. That's why Kurt has HR Hotline (HRH), Zywave's on-demand resource staffed by HR professionals.

Kurt likes to give a prospect access to HR Hotline for a trial period. It's an easy way to demonstrate the value he brings and how's he's different than the incumbent broker. This strategy is something he knows competitors are not providing, and it has helped him land several new accounts.

He also keeps a seat of HR Hotline for himself. This way, when his clients have questions, he can get them answered quickly by Zywave's HR professionals and build his reputation as an expert.



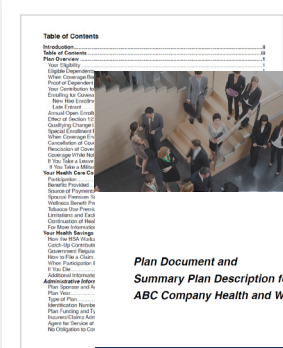


# How Kurt wins with Plan Doc Builder®

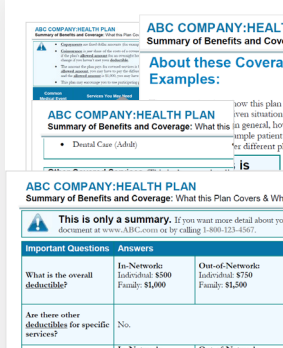
Kurt uses Plan Doc Builder (PDB) to create SPDs, wrap documents, SBCs and other ERISA-compliant resources in minutes, ensuring that his clients are always prepared for a DOL audit and tying that value back to the agency.

Buursma Agency also uses PDB in a fee-for-service model. He charges clients for Section 125 documents. That's ancillary revenue for the agency in a time where commissions are being cut.

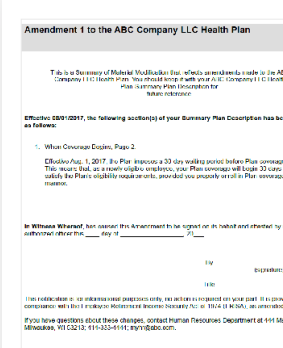
The ACA forced brokers to take a different approach. Clients expect more help with compliance all while commissions are being cut. PDB helps me meet client and prospect demands and supplements agency revenue when we use it as a fee-for-service tool.



SPDs & wrap docs



SBCs



SMMs