

Gilroy, Kernan & Gilroy, Inc



LOCATION
New York

SUCCESS WITH
Broker Briefcase BE, Broker Briefcase PC,
Brokerage Builder, MyWave Elements,
HRconnection

AGENCY PROFILE
Full service agency serving large
and small clients, been in business
over 100 years

ROI FROM ZYWAVE

50 clients actively using
MyWave Elements portal

“We’ve gotten great feedback, particularly from smaller clients. They don’t have HR departments or the time to think about all this information, so the portal has become their ‘HR assistant.’”

RESULTS

Expert support from
Zywave consultant in portal
redesign project

CHALLENGE

When Sarah Westfall joined GKG, the agency had had Zywave solutions for a few years but weren’t taking full advantage of the tools. Sarah’s new role was as a dedicated Zywave Champion to help her agency maximize their ROI.

SOLUTION

One of Sarah’s major projects was redesigning their MyWave Elements client portal to align with an agency rebrand. This was a large endeavor, so she partnered with a consultant on the Zywave Partner Relations team for the project. “Partner Relations is a resource for all our Partners, whether they want help on strategic execution, have a major project like Sarah did, or have an agency challenge to overcome related to their use of Zywave tools,” said Kate Rasman, Director of Zywave Services & Support. “Our goal is to help each Partner maximize use of their tools.”

RESULTS

Since the portal redesign, Sarah says utilization has gone up significantly. Her Partner Relations consultant helped her plan client trainings, webinars and seminars to reengage clients in conjunction with the redesign, which Sarah said was integral to their success.

“Before starting these trainings, we had a couple strong users, but knew we weren’t maximizing on our capabilities,” said Sarah. “Now we have about 50 clients on the portal and most are actively using it. We’ve gotten great feedback, particularly from our smaller clients. They don’t have HR departments or the time to think about all this information, so the portal has become their ‘HR assistant.’ On the safety end, we have clients that use it every single day for the toolbox talks, really integrating it into their safety culture. The OSHA log is also very popular.”

With the redesign of the portal, Sarah was excited to add some custom features, such as the ability for clients to contact a GKG representative directly, right from the home page. They also have a custom wellness tab, with information from their certified wellness expert. One strategy GKG uses with the portal is to open all content up to all clients, regardless of whether GKG writes all their lines of coverage. “This offers cross sell potential, but also exemplifies our partner approach to clients. We want to offer each client our full suite of solutions, even if only writing one line of coverage currently,” said Sarah. “We have well over 90% retention, well above industry standards, so clients are definitely satisfied with the approach.”

Sarah really appreciated the support she got from her Zywave consultant throughout the portal redesign project. Her consultant would share best practices and recommend strategies, and then help Sarah execute.

“Sarah and GKG are a great example of how a little extra Zywave support can reap huge dividends for an agency,” said Kate.