

Offenhauser & Co.



LOCATION
Texas

SUCCESS WITH
Broker Briefcase® P&C

CLIENT MIX
Large P&C groups,
each producer has
specific areas of
expertise

“This great account that Zywave helped us win based on technical expertise makes it difficult for them to move away. And I don’t see them wanting to do so. The resources Zywave provides has a lot to do with our success with them.”

RESULTS

Maintains a consulting relationship with the client, collecting an annual fee

ROI FROM ZYWAVE

\$550K account originated from providing consulting services

BACKGROUND

Located in Texas, but primarily servicing four different states - Texas, Oklahoma, Arkansas and Louisiana - Offenhauser & Co. has been successful at landing accounts in niche markets, often beginning with being hired as a consultant. Each producer at Offenhauser & Co. has a unique area of expertise that sets Offenhauser apart from its competition.

Four years ago, Offenhauser & Co. was contacted by outside legal counsel for one of the 20 largest milk co-operatives in the United States, which is based in Texas but operates and has milk producers throughout the south. Their insurance program was very disjointed and they hired Offenhauser & Co. as a consultant to help them get their insurance in order. Using Broker Briefcase - P&C, Scott Bruner, vice president, was able to provide the milk cooperative with a program focusing on agriculture and safety. “They had never seen these types of documents before - their brokers weren’t providing them,” says Scott.

SOLUTION

As Scott continued to consult, he kept finding valuable documents in Broker Briefcase that helped his client. “There’s a protocol in place for cleanliness in dairy processing plants, and I was able to find a document about how to keep the plant clean and payroll stuffers, both which were valuable to the client,” Scott says.

Since the dairy co-operative has complicated and quirky relationships with logistics brokers and trucking companies regarding leasing trucks, trailers and drop off yards, Scott was able to use the Trucking Risk Insights and Trucking Safety Matters documents in Broker Briefcase to help them ensure trucking safety and compliance within the confines of the relationship.

In addition, Scott utilized the Broker Comparison Checklist, available in Broker Briefcase, as a template demonstrate his firm’s value. “We were able to summarize the different things we were doing for the client in a concise way, allowing them to see the value we provide,” said Scott.

RESULTS

With all of the consulting services Scott provided the dairy co-operative, Offenhauser & Co. eventually won the account, worth \$500K in annual premiums. Additionally, Offenhauser & Co. continues to consult for the client and collects a \$25K annual fee. “This great account that Zywave helped us win based on technical expertise makes it difficult for them to move away. And I don’t see them wanting to do so, Scott said. “The resources Zywave provides has a lot to do with our success with them.”