

Case Study

Location:

South Texas

Brokerage Focus:

Benefits Insurance

Success With:

Broker Briefcase Benefits

Brokerage Builder

MyWave Connection &

Wrap360

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“We wouldn’t be where we are without Zywave. Since 2013, we’ve only lost 2 cases. We doubled our sales the year after implementing Zywave, and our sales have only continued to grow.”

— Roland Barrera, Owner of
Roland Barrera Insurance

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Background

Roland Barrera started his own agency in 2012 after working for a third-party administrator (TPA). It was during this time that Roland first learned about Zywave. While the TPA ultimately choose not to partner with Zywave, Roland immediately recognized the enormous potential of the tools. Upon starting his own agency, one of his first calls was to Zywave.

Solutions

Roland Barrera Insurance uses Zywave’s Broker Briefcase Benefits, BrokerageBuilder, HRconnection, MyWave Connect and Wrap360.

Results

Broker Briefcase has been instrumental in helping Roland reach more clients and prospects. In particular, the automated email marketing campaigns have helped provide valuable and timely updates to his customers, especially regarding health care reform. “After partnering with Zywave, I got more calls in 2013 than I did in 20 years of doing business,” Roland said.

In addition, Roland has set his agency apart by offering ERISA wrap compliance help through Wrap360. “A lot of people don’t know if their plan is compliant. Once you talk with them, you’ll find missing items or items that haven’t been touched in a few years that could hurt them during a DOL audit.”

Roland also notes how helpful BrokerageBuilder’s commission tracking feature has been. “Before, we were just getting commissions in and we didn’t know where it was all coming from. Now we’re able to easily track who is and isn’t paying.”

After partnering with Zywave, Roland was able to double his sales revenue the first year. Since then, he has continued to increase his sales year-over-year and has grown his agency from a one-man shop to an agency with five employees.