



FORWARD MOMENTUM:
2022 at Zywave

We're pleased to share our annual progress report on how we delivered innovation, value, and service to our customers in 2022, continuing on our path to industry transformation.

In 2022, we...



ACCELERATED INNOVATION

361 Product Releases

105 Partner enhancement requests fulfilled

Hosted over **100** industry events & webinars

Launched **new** products for Carriers including Carrier Content Distribution & Carrier Engagement Suite



COMPLETED 1 MAJOR ACQUISITION: STRATEGIC INSURANCE SOFTWARE (SIS)

The addition of **SIS (including Partner Platform)** rounds out Zywave's portfolio of agency management system solutions for employee benefits, commercial, and personal lines.



IN 2022, WE...

Gained Industry Attention

Zywave was named a Leader in **The Forrester Wave: Digital Insurance Agency Platforms, Q1 2022**. The report provided a comprehensive overview of 11 digital insurance agency platforms and evaluated them on 32 criteria across three categories, including current offering, strategy, and market presence. Zywave received the highest possible scores in 15 criteria and was among the highest scores in the Strategy category.

Named a top workplace for the **10th** consecutive year.



In September, we announced a dedicated partnership with **Salesforce**, the global Customer Relationship Management (CRM) leader. This partnership will further bring together the worlds of insurance agency sales and client service, creating more efficient, strategic workflows powered by data and content to deliver a seamless client experience.

Named as a Finalist in two categories in the **17th annual Stevie® Awards for Sales & Customer Service**, and will ultimately be a Gold, Silver, or Bronze Stevie Award winner in the program. The two categories Zywave are recognized for are "Achievement in the Use of Data & Analytics in Customer Service" and "Best Use of Technology in Customer Service – Computer Industries."

PROVED VALUE

A commissioned Total Economic Impact™ (TEI) study, conducted by Forrester Consulting, revealed a 160% three-year return on investment (ROI) for a composite enterprise that deployed Zywave solutions, and a total of \$6.68 million in three-year benefits.

IN 2022, WE...

Helped our Customers Grow, Learn & Stay Informed



ZYWAVE UNIVERSITY

Education for our partners

Instructor-Led Sessions with a Subject Matter Expert

2,529 sessions

3,847 attendees

On-Demand Sessions Available 24/7

57,519 sessions

19,288 attendees



THOUGHT LEADERSHIP EVENTS

5 major events focused on Property, Casualty,
and Cyber.

193 industry leaders featured as event speakers.



WEBINARS

Hosted **100** free, educational webinars on today's
most vital insurance topics.



ENHANCED OUR SOLUTIONS PORTFOLIO

Sales Cloud

Added the **Group Benefits Quoting API**, allowing instant quoting capabilities with more than **55,000 plans from 590+ carriers** without the need for new software. Using this API delivers great value by eliminating data entry errors, reducing time to update carrier data, and minimizing downtime to validate data.

Completed **150+** enhancement projects for recently acquired **Partner Platform**, including multi-factor authentication, the ability to attach documents to activities, activities search, adding Commercial Inland Marine line of business and classifications, ability to edit producer commission after invoice has been paid, and TurboRater integration.

Released over **20** product releases across the **Personal Lines CPQ** product.

Ingested over **30 million** new data points into **miEdge** to continue improving the quality of our unique employer insurance profiles. Also launched miEdge alerts to enable producers, risk managers, and account managers to proactively communicate to clients and prospects when significant events or changes are happening.

Launched **Zywave Websites** to provide unprecedented levels of reliability and scalability for our clients' websites with Insurance industry focused designs, content and integrations.

Launched **Dec Page Connect** to help personal lines producers automate the process of obtaining declaration pages from their clients and prospects, providing a massive boost to productivity and accuracy in the data gathering.



ENHANCED OUR SOLUTIONS PORTFOLIO

Content Cloud

Created over **2,000** new pieces of content and updated over **10K** pieces of content.

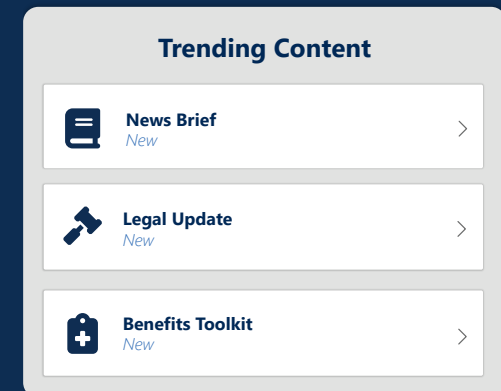
Produced **24** custom video templates. Since launch, over **1800** custom videos have been created by partners.

Expanded integration with **Salesforce** to enable a seamless experience for users to access both Zywave's content, as well as their own company's content, directly within their Salesforce environment.

Carriers and Service Providers can now publish content directly to partners via our **Content Publishing** feature. This new license type allows content distributors to upload, tag, and publish content that surfaces to agents when relevant.

Enhanced **content customization** options including custom fonts, improved page breaks for downloaded content, and series-specific content themes.

Automatic **campaign renewals** are now available, removing the need to set up annual content campaigns manually along with saving time and effort.



ENHANCED OUR SOLUTIONS PORTFOLIO

Client Cloud

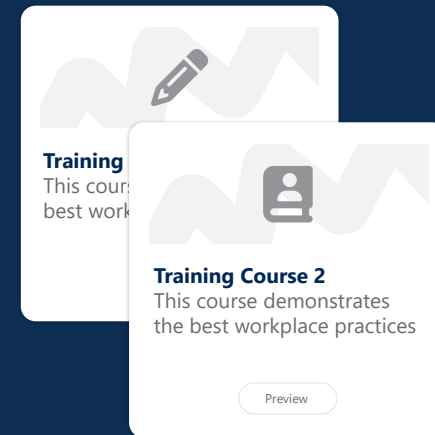
Our customers and their clients completed over **577,000 courses** within our **Learning Management System** including key categories of sexual harassment prevention, workplace management, and safety training.

Provided guidance from experienced HR professionals who are well-versed in topics including benefits, federal compliance, employment law, wage and hour, discipline and terminations, hiring, workers' comp for **17,932 HR Hotline** cases.

Gained ability to add **customized** pages and modules to client portal, as well as the ability to add an external link as a custom page.

Added **Benefit Document Builder** to the Client Cloud, saving time and allowing our customers to stay in compliance with custom, attorney-written Wrap SPDs and plan documents.

Our partners created more than **32k** documents using ACA Reporting App, Handbook Builder, OSHA log, Compliance Notice Builder, and Enrollment Booklet Builder.



ENHANCED OUR SOLUTIONS PORTFOLIO

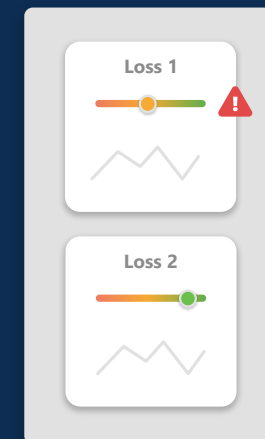
Analytics Cloud

Expanded our industry-leading loss data, **Loss Insight**, to include **over 1 million** loss records focused within cyber liability, excess casualty, D&O, and EPLI. The total loss amount recorded for these low frequency, high-severity cases now exceeds \$10 trillion.

Enhanced **ModMaster** to include a new mod creation workflow and reports that can be customized and better branded to your organization. These enhancements drove nearly **4,000 mod analyses** to be created per month.

Updated the look and feel of our **Benchmark Analysis** interface to be more intuitive for users and provide more opportunities to create reports and engaging graphs helping showcase important coverage recommendations and benchmarks.

Streamlined how users can access and derive insights from **Cyber OverVue** to help identify and determine appropriate cyber protection for their clients.



Industry transformation ahead. We're ready to continue providing the extra value you need. Want to learn more? Contact us at marketing@zywave.com