

## Orgill/Singer & Associates



LOCATION  
Las Vegas, NV

AGENCY PROFILE  
Benefits, P&C, personal lines;  
large agency (over 50 ee's)

SUCCESS WITH  
Broker Briefcase® - Benefits, Broker Briefcase®  
- P&C, HRconnection®, MyWave Elements®,  
BrokerageBuilder®

“  
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### ROI FROM ZYWAVE

Several leads from Broker Briefcase campaigns

### RESULTS

60 new Elements portal activations in 45 days

## BACKGROUND

Orgill/Singer & Associates has been a Zywave Partner for over three years now, owning several different products. Recently, they saw a need to target more clients and prospects and took on a new challenge: email and social media marketing. Robert Church, Business Intelligence Specialist, says that without the resources contained in Broker Briefcase, he would not be able to successfully run marketing campaigns.

## SOLUTION

Church has begun running campaigns by targeting very specific segments of clients and prospects, and then sending appropriate content to these lists. “We want to provide people with the things that they are looking for,” says Church.

Church has a unique way of using Broker Briefcase and MyWave Elements together. “My first step is to always go into Broker Briefcase and find documents that are going to attract an audience.” After that, he puts together a campaign and tracks who clicks the document. Church will then send a follow up email to the client who downloaded the document and ask if they have their Elements portal turned on. “It is a way to get a foot in the door and let them know that Orgill Singer has a whole bunch of similar documents available for them,” says Church. Church will also turn on Elements portals for prospects for 30 days to let them “test drive” it and see some of the great content that is provided to clients.

## RESULTS

Orgill/Singer has had great success with some of the campaigns they have run and some successes with other products, as well.

- Recently, they ran three campaigns - two on cyber liability and one surrounding work comp. “Typically, we will turn on 1 or 2 Elements portals a month. Because of these campaigns, 11 leads called us and we have turned on about 60 portals in the last month and a half,” Church says.
- There was a recent news story in Orgill/Singer’s market about teen driving. Using Broker Briefcase documents, Church got a lot of traction through their Facebook campaign about safe teen driving. “Without the help of Broker Briefcase, we wouldn’t know where to start when something timely like this comes up,” says Church.

“We have seen some off the charts results just from using Broker Briefcase,” says Church. “The way all of the Zywave products tie together is phenomenal. It has evolved into a very valuable tool for us.”