

Case Study

Partner:

True Broking Ltd

Location:

Bolton

Brokerage Focus:

Commercial

Success With:

Broker Briefcase UK

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Broker Briefcase helps save me time by delivering relevant, insightful pieces to clients and businesses I want to work with. That way there's already a meaningful connection by the time we get introduced.

— Chris Boothman, owner of True Broking Ltd

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Background

True Broking Ltd is a small independent commercial broker based in Bolton. As a general broker, they are always looking for ways to provide value-added services and be a trusted advisor to their clients, which is what led them to partner with Zywave. They sought to better serve their clients by leveraging technology to provide a more personalised approach to insurance.

Solution

True Broking Ltd uses Zywave's Broker Briefcase UK.

Results

Since partnering with Zywave, True Broking Ltd has been able to use Broker Briefcase's content to win new clients and increase profitability, which Chris Boothman, owner of True Broking Ltd, believes will continue for years to come.

After implementing Broker Briefcase, True Broking Ltd saw an immediate positive impact on their business, especially when it came to time savings and client engagement.

"With Broker Briefcase, I don't have to spend hours finding images or writing content for an email or blog post. Instead, I can just look up a topic in Broker Briefcase and find documents that are informative and compliant, which is important in our regulated environment," says Boothman.

By using Broker Briefcase's vast library of insurance industry content, True Broking Ltd is able to deliver supportive documents to clients and prospects to not only help their business, but generate interest and engagement. All of which helps them better support their clients and demonstrate the value and level of expertise clients can expect when they partner with True Broking Ltd.