



LOCATION
Tamworth, West Midlands

BROKERAGE FOCUS
Commercial and private insurance

SUCCESS WITH
Broker Briefcase® UK and
MyWave Connect® UK

“With the additional documents provided to prospects and clients from Broker Briefcase, we have identified over **£20K of business which we have won.**”

—Matt Small
Sales Manager

BACKGROUND

Prizm Solutions Ltd. was formed in November 2006 when Peter Robinson and Tracy Pound saw an opportunity to radically change the way insurance is transacted. They formed Prizm Solutions to provide a high-value, low-cost, ethical and professional approach to handling commercial insurance. They were looking for software tools that would enable their brokers to provide that approach consistently to current and potential clients.

SOLUTION

Prizm Solutions Ltd. chose Zywave’s Broker Briefcase® and MyWave Connect® applications.

RESULTS

According to Matt Small, Sales Manager, Broker Briefcase has enabled the Prizm team to share value-added content with prospects. This has highlighted the additional benefits Prizm can offer and has increased the number of prospects allowing Prizm to quote against their current broker. They have also won several commercial motor cases on the back of the additional support Broker Briefcase can offer with driver handbooks and other resources.

Prizm has had several clients who have been able to save money by using Broker Briefcase’s health and safety documentation. A few even have been able to take their current advisers off retainers, making considerable savings. And Broker Briefcase has had a financial impact on Prizm as well.

Small said, “With the additional documents provided to prospects and clients from Broker Briefcase, we have identified over £20K of business which we have won.”