ThreeFlow | **EPIC**
Insurance Brokers &
Consultants

How EPIC saves time with their RFP and renewal processes and increases market share

Going to market and renewing can be intensive and time-consuming. ThreeFlow helped EPIC of Indianapolis streamline the process so they could focus on other important firm initiatives.

EPIC
Insurance Brokers &
Consultants

EPIC Insurance Brokers & Consultants is a unique and innovative retail risk management and employee benefits insurance brokerage and consulting firm. With offices and leadership across the country, their depth of industry expertise spans risk management, property and casualty, employee benefits, unique specialty program insurance, and private client services.

We talked with Vickie Wood, Managing Director of Client Services, Candace Hiatt, Carrier Marketing Manager of Employee Benefits, and Calvin Conerly, Managing Director of Client Engagement in the Indianapolis office. They helped us learn more about how they streamlined their processes and saved time generating RFPs by using ThreeFlow.

HEADQUARTERS
INDIANAPOLIS, IN

TYPICAL GROUP SIZE
51+

REGIONS SERVICED
MIDWEST

WE HEARD FROM

Vickie Wood
Managing Director
of Client Services

Candace Hiatt
Carrier Marketing Manager,
Employee Benefits

Calvin Conerly
Managing Director
of Client Engagement

Why did you choose ThreeFlow?

As an organization, we were looking at ThreeFlow because the RFP and renewal process can be time-consuming. We have account managers that have typically been responsible for that process, and it's a tedious and intensive one for them.

Also, when you have 12 to 13 different people doing something, even if there is a standardized process in place, the final output can sometimes be a bit disjointed. From an efficiency and consistency standpoint, we were also looking at ways to be more cohesive in our marketing and to improve accuracy.

After looking at our available options, we decided as an organization that ThreeFlow was something we wanted to pilot. It has been an excellent platform for us and has really streamlined a lot of our processes. We've also seen fewer service issues and have more time to focus on our customers rather than hours in a spreadsheet.

How did ThreeFlow improve efficiency for your teams?

Speaking from experience as an account manager, gathering materials for an RFP can take a few days, especially if we have to reach out to a carrier and ask for a new certificate.

As far as sending the RFP to market goes, even though it's just a matter of an email, it's still time-consuming to compile all the information into that email and send it to multiple carriers. And once carriers began to respond, it definitely takes several hours to parse out that information into a spreadsheet if we reached out to three, four, or five carriers.

However, with ThreeFlow, we have every client in the system, and all the needed documents are already there. Now sending an RFP and exporting the output only takes a matter of minutes. ThreeFlow saves us days' and hours' worth of time per client.

ThreeFlow has helped us analyze and better understand our quoting process. We can see who we're requesting quotes from and how competitive they are. This helps us have more productive conversations with our carrier partners about how they can win more business from us and our clients.

What are some of the most significant benefits you and your team have experienced since working on ThreeFlow?

ThreeFlow has helped with consistency—what and how we present to our clients. Before ThreeFlow, our account managers were entering information in different ways. Once it got to the producers, the quotes or presentations didn't look the same.
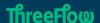
Now, everyone is getting one uniform output since it's being exported straight from ThreeFlow. Every producer receives the same presentation, creating more streamlined workflows internally between our account management and producers.

ThreeFlow has also helped with eliminating errors. There was a lot of manual entry into spreadsheets, which no one really enjoyed. Getting a clean output from ThreeFlow, with details submitted directly from the carriers, has definitely been a plus.

This all has allowed us to be a lot more strategic about approaching different carriers and market segments. For example, before ThreeFlow, if we found out that a carrier was offering a new product, we could only hope that our account managers knew to leverage that information the next time they shopped for quotes. But with ThreeFlow, the information about that new product from a carrier is entered into the system, so it's visible and top-of-mind for our account managers to take advantage of.

"If you're looking for a win that you can take back to your account team and add more time to their day, then you may want to consider ThreeFlow."

Calvin Conerly
Managing Director of Client Engagement

ThreeFlow

What would be your advice to other offices considering changing their current process?

Don't be afraid. Just jump in and do it.

ThreeFlow has given us the opportunity to take something that was being completed by 13 people down to 1, while completing it more efficiently and accurately. It has also allowed us to go to more carriers than we would have otherwise because it's a lot easier to aggregate the information.

There's also a whole ThreeFlow team behind you to help with implementation, client setups, and getting you started. It's not all on you. We wouldn't have been able to implement ThreeFlow during our fourth quarter without the help of their amazing support team. If you have an organized approach, the benefits outweigh the initial prep work.

ThreeFlow has played a pivotal role in streamlining our processes, creating consistency, and giving us time back to focus on other important strategic firm initiatives.

ThreeFlow

ThreeFlow is a Benefits Placement System, enterprise software that allows benefits brokers and insurance carriers to maintain their relationships and enhance collaborative efforts to help employers make the best benefit decisions for their employees. We connect people, systems, and information to enable operational advantages, data-driven decisions, and top-talent retention.

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