

# DYNAMIS CASE STUDY

## Company Background

Founded in 2002 and headquartered in Winchester, VA, The Winchester Group (TWG) is a full-service, independent insurance agency. The Winchester Group offers business, employee benefits and individual insurance solutions, with a philosophy of providing value beyond insurance quoting.

## The Challenge

After the Affordable Care Act went into effect, The Winchester Group made a decision to be “all in” on employee benefits. It was critical to stand out in the competitive northeast market, so TWG sought tools and solutions to differentiate them and provide maximum value to clients.

After seeing the Dynamic Plan Designer tool from Dynamis, TWG felt it was a valuable solution to support ACA needs (such as Community Rating), enhance their renewal process and win more business.

## Sales Results Using Dynamis

Although The Winchester Group initially partnered with Dynamis to help with ACA and Community Rating, they soon realized it was a powerful sales tool for groups of all sizes.

According to John McGraw, Employee Benefits Advisor at TWG, the Dynamic Plan Designer has helped them differentiate. Using the solution, he has won 3 new clients in just the first quarter of 2017!

“When I go up against a competitor, this approach feels more professional and easier to illustrate options,” shared McGraw.

One of those wins was a BOR, and McGraw felt that Dynamis really put TWG over the top. “The incumbent broker didn’t have the kind of technology we offered, or the level of detail we could provide with the Dynamis solution,” said McGraw.



# DYNAMIS CASE STUDY CONTINUED

## Client Service Results Using Dynamis

McGraw shared that having the Dynamic Plan Designer allows him to truly tailor renewal meetings based on the individual client.

Some clients just want a high-level snapshot of their options; for those renewals, he will print out Dynamic Plan Designer reports to discuss during the meeting. For clients who want more detail, they've loved the ability to explore plan design options and contribution strategies in real-time.

The Dynamic Plan Designer has been an invaluable asset with small employer groups, a significant niche for The Winchester Group. "When a small business is making a decision to offer employee benefits for the first time, they often aren't sure of budget, contribution strategies or plan design," said McGraw. "Using the Dynamic Plan Designer, I can sit with them in real time and explore all their options."



*We're an agency that provides assistance on many levels, not just quoting insurance plan options. Adding the Dynamis solution to our repertoire has been great."*

