

INSURANCE

TIMES TODAY



Brightway

Realtors' and Lenders' Secret Weapon for
Closing Deals and Gaining Customer Loyalty



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Inurance needs an image makeover. Often considered boring, confusing, and a painful process. It doesn't have to be that way when you can partner with someone that specializes in what you do and puts an extreme focus on providing an amazing experience. Over the past decade and a half, Realtors and lenders have learned that Brightway Insurance is the answer to happy clients, happy experiences, and a smooth process.

Brightway Insurance owner Billy Wagner started the business from scratch in 2006 and has grown it into a top 1 percent agency in the country. It's become so successful, in fact, that almost all of Brightway's impressive book of business comes via referral from consumers, Realtors, and lenders who are so ecstatic about the unique practice that they can't wait to tell friends, family, and colleagues. This business model didn't happen by accident. "A couple years in I realized how much easier it



was to do business when they came to us from a referral,” Billy says. “We decided to change the way we do business and put an extreme focus on the

homebuying process. We looked at every process to make sure it supported and made things easier for Realtors and lenders.”

Client and Partner focused business

Brightway reinvented the insurance process to become a client- and partner-focused business model. The company even saves each partner’s unique process to make transactions easy. The who-needs-what-when is already figured out, which provides a better experience for the client, and Realtors and lenders save time by not needing to follow up on things and request what they need. It’s all saved and ready to execute at a moment’s notice.

Too often, insurance companies make clients feel that they’re on opposing sides. But Brightway is committed to demonstrating that everyone is on the same side—Realtors and lenders, clients, and Brightway. “We all have the same goal: getting the clients into the home of their dreams,” Billy affirms. “When you have a focus on a particular niche, you can become an expert. We’ve been able to develop these amazing friendships with Realtors and lenders over the years that are centered on trust and knowing that we have each other’s back.”

It’s not surprising, then, that Brightway received 4,800 referrals last year alone. “Each one is sacred to us,” Billy says. “We don’t take that trust lightly.”

What’s driving that number of referrals in a marketplace riddled by unhappy consumers? Part of the answer lies in the fact that Brightway doesn’t represent a single company; they have relationships with dozens upon



dozens of insurance companies so they can find a customized solution for every one of their clients. Cookie cutters have no place inside the Brightway office. “It’s like going to the vanilla ice cream store when you can have 31 flavors,” Billy explains about the difference between a single-company agency and one that represents a broad array. “Choice will always lead to a better outcome for the client.”

Keys To Brightway’s Success

The key is Brightway’s transparent process, in which it shares with clients the ability to open up every possible option in the marketplace. Then, it’s a matter of building a customized plan that replicates what staff would do if they were insuring their own home. “We have done the research on all the companies to understand which provides the best coverage, the best claims experience, and the best value given their unique situation,” Billy says. “Our goal is to simplify the process and make it easy to secure the necessary protection.”

He’s not saying it’s easy to design multi-pronged deals tailored to an individual’s needs and resources; on the contrary, he calls it a “complicated process” to find the best option. But when you have options, the consumer is much more likely to get the best value. And satisfied consumers mean lasting relationships that can turn into future business.



Billy Wagner shares how he grew his agency by simplifying his life

Another secret to Brightway’s success can be found in its team members, of which they choose only the best. Each employee is recruited and then selected from a pool of more than 300 applicants. Then, those cream-of-the-crop team members are put through an intense 12-week training that is organized to the minute. “They become ninjas, thanks to our process of going through hundreds of scenarios,” Billy says. “We also work as a team, with each employee specializing in a specific product so our clients get a combination of the best knowledge in the industry.”

Built-In Benefits

The Brightway process of securing the ideal insurance for every client already puts them in a category of their own. But the fact that they also add incredible benefits for Realtors and lenders positions them as unmatched partners in the marketplace.

Like the way their team operates? Brightway can help your own team with:

- Time management strategies
- Team building and culture
- Goal setting and accountability
- Building a scoreboard for your team

Looking to attract more business? Brightway will help by:

- Sharing, posting, and highlighting you on social media
- Introducing you to Realtors, influencers, and master networkers
- Promoting reviews for you after a mutual transaction
- Providing access to valuable information about properties/inspections

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It's no wonder local Realtors and lenders can't send their clients to Brightway fast enough. The truth is that Brightway has built its business around them by creating a focus on the homebuying process. They know the pain points and have discovered how to make every transaction a pleasure. The team even makes it a priority to talk up their Realtor and lender partners to clients. Billy explains, "We have a set time in the process that we reinforce the relationship they have with the client, saying something like, 'You're lucky to be working with (Realtor name). We work with a lot of Realtors, and she is one of the best.'"

Incredibly, the company ensures that all deals close. Yes, ALL deals. Billy estimates that Brightway saves between five and ten deals a week that have fallen apart with other insurance agents. When Realtors and lenders trust clients to Brightway, not only do all



deals close, but the client sees the Realtor as the hero of the transaction.

Closing deals no one else can close might sound like a painful process, but Billy promises that the Brightway experience is always enjoyable. “We save everyone time; our partners and their clients wait for nothing,” he says. “We have access to over 50 companies and find the best combination of carrier quality, value, and protection. We also answer the phones live 24 hours a day with a greeting of, ‘How can I make this the best call of your day?’ And we end every call by saying, ‘Thank you for being the best part of Brightway.’”

Community Partner

Brightway also wants to be the best partner possible in the community. Team members make it a priority to get involved in local non-profit endeavors, taking time to lead organizations like Rotary, serving as President of Mission House, and raising money for a transportation van for a non-profit. To take that service to the next level, Billy and his team launched the Wagner Family Foundation so they can make an even bigger impact. He calls it a “team approach” wherein everyone volunteers their time and takes part in



1 Brightway Sales Agent celebrates a client getting a Brightway tattoo

Built-In...

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Want to work efficiently?

Brightway offers:

- 24/7/365 access to a live person
- Notary services
- To save your unique process to make sure each transaction is easy
- A flood resource to run determination and provide a quote
- A conference room for your use

Interested in making the most of events? Brightway can:

- Organize happy hours and lunch-and-learns for your team
- Sponsor a partner's marketing event
- Deliver VIP invites to their events
- Partner with you on non-profit community work

All of these value-adds are not only a (free) part of the Brightway collaborative experience, but they're in addition to the personalized service and perks that are built in for Realtors and lenders.

quarterly community service projects. The Wagner Family Foundation also provides grants to local non-profits, and the entire team sits on that board. "This is something the large online companies cannot do," he says. "We are trying to be the example for others to follow—to use the business to do good in the community."

Their community orientation starts in the workplace, though, with an emphasis on helping each client get the insurance they need to buy a home for themselves and their families. The Brightway team is able to do that because they've built special relationships with carriers to ensure they can solve all the issues that come up. They've even been able to secure exceptions on things in grey areas because they've built trust with carriers. "They'll do things for us they will not do for other agents," Billy says.

Not surprisingly, Brightway has nearly 750 five-star reviews on Google—many from Realtors and lenders. "When other agents are saying 'no' and refusing to do the hard work, we're saying 'yes.' We find a way to get it done. Once Realtors and lenders realize the extra value we bring, we become a part of their process."

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Newly Released Book Shares How To Simplify Business

Billy Wagner and his Brightway Insurance Team writes more personal line insurance than almost anyone else in the country. Serving over 13,000 clients with a small staff of 16 employees at a world-class level doesn't happen by chance. It happens by design. A design Billy worked hard to develop over the years. From his early days as an entrepreneur to an employee and as an entrepreneur again Billy is always looking for ways to simplify his business and his life to make the greatest impact possible.

Written primarily for Real Estate Agents, lenders and insurance professionals, Billy pulls back the curtain to his uncommon success.

"My goal for writing this book is to share principles that have the power to change your life. I live my life by design and hope my own secret sauce I share in this book motivates you to do the same thing", says Wagner.

To find out more about the book or to see the impact it is making in the community visit Billy-Wagner.com

