

The Cason Group Exceeds Expectations with Formfire

About The Cason Group

The Cason Group, a General Agency based in the Southeastern United States, has worked with Brokers and Groups for over 30 years to offer relevant health insurance solutions. With extensive industry knowledge, they represent more than 20 Carriers—including seven medical Carriers in four different states. In addition, The Cason Group strives to go above and beyond for their Brokers, helping strengthen their partnerships so they can find the best coverage for their clients.

186%
INCREASE

From 2019 to 2021, The Cason Group processed almost triple the number of applications through FormFire — an increase of 186%.

“Our main mission is to be able to provide solutions that exceed expectations for our Broker partners.”

— Drew Brickwedde, Manager of Group Sales Support at The Cason Group

The Problem

Several years ago, The Cason Group noticed a change in the marketplace. Level-funded plans were gaining in popularity, and Groups often wanted quotes from multiple Carriers. The Cason Group knew they needed to offer their Broker partners a tool to gather Group data and medical information more efficiently. While they wanted a turnkey software solution, The Cason Group also didn't want to be in the business of selling technology. Instead, they needed a platform that could be easily purchased and accessed by their sub-agents free of charge.

Our Solution

By partnering with FormFire, The Cason Group can offer one easy and convenient place to collect applications, significantly reducing their Brokers' workload. FormFire's platform allows them to provide a better experience for their Broker partners and reduce the hassle of collecting one or more paper applications from employees. Groups can even fill out applications for Carriers that The Cason Group does not represent. With this approach, The Cason Group understands they might not win every account. However, they want Brokers and Groups to see the value they're providing with FormFire—making it more likely they'll partner with them on the next sale.

The Results

- From 2019 to 2021, The Cason Group processed **almost triple the number of applications** through FormFire — an increase of 186%.
- The Cason Group uses FormFire to offer **online medical health questionnaires** (MHQs) to over 470 Groups.
- In just four years, The Cason Group experienced a nearly twenty-fold increase in the **number of active Groups** they worked with in the FormFire platform.

For more info, call 216-357-7400
or contact sales@formfire.com

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