

## Positioning an Insurance Brokerage and Consulting Firm as Industry Thought Leader



*EPIC Insurance Brokers and Consultants is a unique and innovative retail property & casualty and employee benefits insurance brokerage and consulting firm. Since its founding in 2007, EPIC has grown revenue from \$12 million to an estimated run rate of \$280 million through both organic growth and strategic acquisitions. With 1,100 team members operating from offices across the U.S., EPIC has a depth of industry knowledge across key lines of insurance, including commercial property and casualty, employee benefits, unique specialty program insurance and private client services.*

### **The Opportunity**

EPIC's expertise across the insurance field provided the perfect opportunity to create an ongoing campaign both regionally and nationally to position EPIC subject matter experts as thought leaders in their respective industries. After identifying targeted publications, Tanis worked with EPIC experts to create unique points of view on industry trends to provide meaningful insight on topics ranging from employee benefits, wellness, healthcare, Affordable Care Act, retirement, cyber security, private exchanges, OSHA and transportation.

As a result of the campaign, Tanis placed 21 contributed articles in 12 industry publications and 56 unique articles in 20 industry publications over a 2-year period, garnering over 12,835 press mentions.

*"They were new to the insurance business when we engaged them (part of why we selected them – we wanted something fresh and unique, that challenged our own beliefs and preconceptions) and they proved to be quick studies; smart, honest and capable advisors; and extremely effective professionals. Not to mention a team of great people. No BS. Just commitment and results. I endorse them without reservation."*

*- Dave Hock, Senior Vice President,  
Marketing and Communications at EPIC*

## The Assignment

- **Identify publications** that accept contributed articles and reporters who are looking for Subject Matter Experts (SMEs) to use as sources in their articles
- **Help EPIC SMEs identify key industry trends** and create exclusive content on how these trends impact customers, as well as provide tips and guidelines for navigating through challenges and opportunities
- **Create compelling abstracts** that articulate the trend and its impact on various industries
- **Proactively pitch abstracts to editors** with whom we have developed relationships with over the past two and a half years.
- **Search high and low** through media databases, HARO, Google alerts, social media conversation tracking and old-fashion editorial calendars to unearth editorial opportunities
- **Ghost write articles** based on publication guidelines, carefully developing a storyline that appeals to the publication's audience without over-marketing EPIC
- **Work with SMEs** to review and refine the article based on their expertise on the topic prior to submitting



"The key to managing employee benefit plans during a period of uncertainty is to plan ahead," said Rosemary Hughes, a principal with EPIC Insurance Brokers and Consultants in Stamford, Conn. If developments could result in a loss of jobs – perhaps a merger is in the works – or if an economic downturn would depress the organization's revenues, it could be time to negotiate with vendors to allow your company to end the contract early."

## InvestmentNews

"Overall, I certainly think it's another avenue employers have, especially if they can't compete with the costs and challenges of a 401(k) plan," according to Rob Massa, director of retirement at Ascende Inc., an advisory firm with roughly \$3.7 billion in defined contribution plan assets."

## RISK & INSURANCE

"Even if a driver is not at fault in a crash that results in serious injuries or fatalities, ultimately the company's reputation is at stake, said Michael Nischan, vice president, transportation and logistics risk control at EPIC Insurance Brokers and Consultants in Atlanta. "Damages from civil suits may not be covered by insurance, so whether the driver is at fault or not, the costly settlements may ultimately cause a company to go out of business," Nischan said. "The key is to ensure the driver is qualified before hire and throughout employment, and that requires continuing dialogue and education throughout the organization."

## HCPPro

"Aside from the typical third party safety consultants, there's also their insurance broker," he says. "They may have access to certain services through the insurance company. Sometimes you can ask the insurance carrier for some logics control, but sometimes the logics control guy is only going to so the eyes and ears for the underwriter. So I think going to their agent, their broker, can help in getting some services. They may have some internal safety consulting services. That person is not the eyes and ears for the underwriter, but he works for them and can provide a perspective of what an OSHA inspector might look at." - Chris Mancillas, Senior Vice President, EPIC HCPPro

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## Results

- **Placed 21 contributed articles** in 12 industry publications on employee benefits, wellness, cyber security, private exchanges, OSHA and retirement over a 2-year period
- **Secured coverage in 56 unique articles** in 20 industry publications over a 2-year period
- **12,835 total press mentions over a 2-year period**