

InsureOne Benefits

Learn how AgencyBloc was able to assist InsureOne Benefits in moving over 250,000 individual records, 75,000 policies, 25,000 attachments, and create over 750,000 new activities in Automated Workflow to help the agents get started sooner.



Specializes In

Family & Individual Health Insurance, Medicare, Life

Previously Used

GoldMine, SugarCRM

Employees

10

Agents

6

Website

insureonebenefits.com

250,000+

individual
records
moved

Since 2001, InsureOne has been helping the residents throughout Ohio navigate and understand the personal health, family health, and Medicare insurance process. To date, InsureOne has assisted over 50,000 people in securing personal health coverage while helping over 150,000 more understand their coverage options.

The Problem

InsureOne started on GoldMine, a generic CRM, but found that the system wasn't a good fit for their agency because it didn't allow them to track multiple policies under one individual. It required multiple contact entries to tie to each policy which resulted in a messy database. From there, they transitioned to SugarCRM, another robust generic CRM, which took nearly a year to customize. This transition was extremely frustrating for InsureOne because their web developer had no prior knowledge of the health insurance world and didn't fully understand their needs. Although the possibilities for customization were endless, they found SugarCRM to be "pretty vanilla" and the customization charges to be too high. The biggest problem they faced was with the lack of a way to track and process commissions. SugarCRM didn't provide them with a commissions platform, so they paid a web developer to build one out for them. After spending an enormous amount of money and waiting an extended amount of time for the platform's completion, they learned that SugarCRM's new update wouldn't support any of the customizations they had done. This meant they would have to go through the whole process again and spend even more money. All of the customizations, big and small, were difficult and created multiple hurdles and headaches for InsureOne.

Our Solution

Once they were informed that the new update wouldn't support their customizations, InsureOne decided it was time to move.



“Using AgencyBloc gives us a leg up against other agents/agencies because we’re able to track and manage our commissions in ways no one else can. Nobody has the capabilities of tracking and paying splits; it’s a marketing angle for us to ‘acquire’ other books-of-business. The system is logical and makes sense and has helped us make our process much more streamlined and efficient.”

Matt M. | InsureOne Benefits

Unfortunately, this meant they needed to move fast as they only had 3 weeks left in their contract with SugarCRM. With employees that aren’t “super tech-savvy,” they wanted to ensure the transition was smooth and the new system was easy to use. They considered Excel spreadsheets for a time, but with 10,000 contracts and commission processing needs, they found it impossible to effectively track them all. At first, InsureOne thought AgencyBloc was “too good to be true;” but when it came time to decide, they chose AgencyBloc for their robust Commissions+ solution, the availability of Automated Workflow, and because “AgencyBloc already knew the business.” In addition, they found AgencyBloc’s dedication to regular upgrades and improvements to the system unparalleled.

The Result

InsureOne needed to be up and running in less than a month. In that time, AgencyBloc was able to migrate their entire book-of-business comprised of roughly **250,000 individual records, 75,000 policies, and 25,000 attachments**. Additionally, AgencyBloc was able to **create over 750,000 activities in Automated Workflow** so that the agents could get going sooner. Everyone at InsureOne, including the non-technical employees, found the migration to be seamless and the system easy-to-use and understand. InsureOne admitted that they had messy data dating back to their days with GoldMine; AgencyBloc was able to clean-up their data and get everything in order so they now have a streamlined approach to tie all related policies and records in one location under one individual. They’re able to better process and track their commissions now instead of relying on the carriers to always be right. In fact, AgencyBloc has made commissions processing so streamlined that other agents and agencies now ask InsureOne to manage their books of business and commissions for them. Lastly, they’re able to stay in better contact with their clients and prospects by utilizing Automated Workflow in AgencyBloc. With Automated Workflow, they can stay on-top of their leads, inform the turning-65 group of upcoming changes, and keep all their clients and prospects up-to-date about policy-related information.