



Next Step Insurance

Learn how AgencyBloc's industry-specific CRM helps Next Step Insurance manage and track their group business, reduce their time spent inputting and finding information by 80%, and save \$4,000 annually on running reports.

Next Step Insurance specializes in Medicare, health insurance, and life insurance for individuals, families, and businesses in the larger Wisconsin area.



Specializes In
Medicare, Group Benefits,
Medical Insurance

**Previously Using/
Considered**
Redtail

Employees
8

Agents
7

Website
nextstep-insurance.com

The Problem

As Next Step Insurance grew their book of business, they wanted to diversify into group business. However, they struggled to manage group business, group policies, and enrollments using their current system, Redtail. The policy tracking issue also made commissions processing frustrating for the Next Step Insurance team. Tracking client interactions was time-consuming as they had one note per entity to which they added each phone call, conversation, and email—making the note extremely lengthy. Likewise, reporting tools and workflow automation capabilities were available, but they never worked for Next Step's needs.

Our Solution

"Ultimately, it came down to the fact that AgencyBloc was designed for life and health insurance agencies." Before Next Step Insurance became an agency, they were a few brokers partnered together. They wanted to find a way to streamline commissions processing, as well as manage their growing books of business. Once they formed into an agency, they knew they needed a better solution to help them

80%

reduction in time
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information

80%

of their time gained
back in locating
information

\$4,000

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on running
reports



“AgencyBloc has helped streamline pretty much everything—our business, our reporting, our policies. It has made our business flow so much better.”

Sammantha N. | Next Step Insurance

operate more efficiently. They demoed a few systems and ultimately chose AgencyBloc for the features and capabilities available.

The Result

After a year with AgencyBloc, Next Step Insurance has been able to streamline their group business. “I can put in the group information, their employees, their classifications, supporting documents, and tie it all together.” The CRM structure makes sense and streamlines customer service as they can find any information they need quickly. In total, they’ve reduced their **time inputting information by 80%** and have **gained back 80% of their time in locating information throughout the system**. “Finding the information we need is just so much easier.” They can also dive deeper into their data analysis by leveraging Standard and Custom Reports in AgencyBloc. “We use reports all of the time. It’s a complete 180 from how we ran reports before.” Reports once took upwards of 5 hours a week to pull; **now, they can run a report in minutes, saving them \$4,000 annually**. Another data analysis benefit they’ve found is Dashboard Analytics. “The Dashboard is really nice, and it’s the first thing our agents check each day.” All in all, Next Step Insurance is happy they chose AgencyBloc and is looking forward to the future and continued success.