**AgencyBloc**

# Senior Connection

Learn how AgencyBloc's industry-specific AMS helps Senior Connection reduce time spent creating and running reports by 75% and gain back $6,000 and 45% of their time spent on customer service during AEP.



**Senior Connection is a Medicare insurance agency under the parent company, Key Benefit Advisors, one of the largest Third-Party Administrators for self-funded employer groups. Since 1991, Senior Connection has provided Medicare services and education to thousands of seniors.**

## The Problem

Initially, Senior Connection paid a developer to create an SQL database from which they could manage their growing book of business. However, the developer moved on, which left them with no one able to update or maintain the system. It became increasingly more difficult to make necessary changes and update information. Additionally, there was no way to track commissions. "We've been in business for over 30 years, and we've never had a good system to track our commissions and ensure we're being paid appropriately." In addition, reporting was a hassle. "Pulling reports required a lot of manual Excel work as I had to adjust every part of the Excel file to ensure it was right; but I'm still human, and there were still errors."

## Our Solution

"We were already on the hunt looking at solutions like Salesforce, TechCanary, and Agency Matrix, but they didn't meet our needs. Then, we met with our FMO, and they recommended AgencyBloc."

**Specializes In**
Medicare

**Previously Using/ Considered**
Homegrown Solution

**Employees**
8

**Agents**
5

**Website**
seniorconnectionbenefits.com

**<2 minutes**
to pull
any report
they want

**75%**
less time spent
creating and
running reports

**$6,000**
gained back of their
time spent on customer
service during AEP

Senior Connection needed three specific things: a way to easily manage clients and policies, a solution for commissions processing, and an effective means of reporting. AgencyBloc's Commissions+ solution, Custom Reporting tools, and Automated Workflow were the biggest draws. The anticipated efficiencies gained when switching to AgencyBloc pointed to a significant annual savings in employee time and resources.

## The Result

One year later, Senior Connection is much more efficient with AgencyBloc. "We love notes, and we're in AgencyBloc all of the time." AgencyBloc is helping Senior Connection achieve a longtime dream of being paperless since uploading and attaching client files is incredibly easy. "Before, pulling a report would take upwards of 6 hours, would slow down my computer, which would heavily impact my productivity. **Now, I can pull any data I want in under 2 minutes, and it's easy to share with coworkers."** They've **reduced their time spent creating and running reports by 75%**. They found their Annual Election Period (AEP) with AgencyBloc to be streamlined and profitable. "COVID-19 and staffing issues made things difficult, but having AgencyBloc and our processes in place made AEP so much easier." They **gained back $6,000 and 45% of their time spent on customer service during AEP**. They're also ahead of pace for post-AEP. "In the past, we'd be in post-AEP until May. This year, with AgencyBloc, we were done in February!" Looking forward, they're excited to create more efficiencies with Automated Workflow, finish going paperless, and continue improving their processes.