

The Brokerage, Inc.

Learn how AgencyBloc's industry-specific CRM helped The Brokerage Inc.'s IMO grow 34% in sales, increase their number of agents by 58%, and uncover over \$40,000 in missing compensation.



Specializes In
IMO

**Previously Using/
Considered**
GBS

Employees
55

Agents
31,000

Website
thebrokerageinc.com

The Brokerage, Inc. (TBI) is a national insurance marketing organization (IMO) based in Texas. They specialize in Medicare, health, and life insurance products and services.

As an IMO, TBI focuses on linking the producer to the right market and carrier while also providing agents and agencies with the necessary resources to reach their goals.

The Problem

In 2017, AgencyBloc acquired GBS, Inc. and began the three-year sunset process of the software. Knowing they had to make a move, The Brokerage, Inc. started to search.

TBI had used GBS for 15+ years but realized it no longer fit them. "The news of the acquisition was a blessing in disguise. We knew we needed a change, and this was our opportunity to find a partner that fit our needs and our business better," says Cristin Hopkin-Bishop, COO of The Brokerage, Inc.

They were searching for a partner who could provide efficient commissions processing and an effective way to track their different payment hierarchies. **"Eighty percent of our business is through our downlines—we needed a better way to track the commission splits and our different hierarchy structures."**

\$40,000+

uncovered
in missed
commissions

\$30,000+

saved annually
on processing
commissions

\$10,000

saved annually
on manual
follow-ups



“AgencyBloc has streamlined our business. It has operationally helped us in more ways than one. We’ve been able to take our business to the next level and grow because of our partnership with AgencyBloc.”

Cristin H. | The Brokerage, Inc.

Our Solution

“Our customer is our agency partner; we needed a system that would support their needs and help us streamline our processes. AgencyBloc was the obvious choice. It fits our model really well.”

As an IMO, The Brokerage, Inc. supports multiple downline agencies and agents—some of whom have their own downlines. **“AgencyBloc was the only option that allowed us to create hierarchies and customize how they functioned to make unique hierarchies per carrier, downline, situation, etc. With that customization, we can definitively trust that our information is correct.”**

In addition to their FMO business, TBI offers back-office services like case management for individual and group insurance cases that need to be tracked separately. “Although the case management side is a small demographic of our total sales, it was important to us to continue offering a high-quality service to those agents who want to utilize us for that.”

The Result

Three years after adopting AgencyBloc, The Brokerage, Inc. has grown their business considerably, streamlined their processes, and simplified commissions processing. “AgencyBloc is the core of what we do. We are able to grow as an organization because of what AgencyBloc has to offer. **Since moving to AgencyBloc, we’ve seen a 58% growth in agents and a 34% growth in sales.**”

AgencyBloc’s Automated Workflow saves TBI **1-2 hours a day in manual follow-ups, resulting in \$10,000 saved annually.** They **spend 75% less time processing commissions, save over \$30,000 annually** on employee time, and have improved tracking of incoming commissions using AgencyBloc’s Commissions+ solution. “We’re able to see what we’re missing and can take that directly to the carriers. We’ve already **uncovered over \$40,000 in missing compensation from two of our largest carriers.** We’re now working on expanding this out to every carrier we use.”

However, the most valuable piece for TBI is the support they can now give their downlines. **“With AgencyBloc, we’re able to take care of our clients as soon as they need anything.** We can run the reports they need with data they can rely on.”

When the GBS acquisition took place, The Brokerage, Inc. went looking for a company with whom they could partner and grow. **“AgencyBloc has grown right alongside us, and it’s helped us align. It’s cool to be partnered with a company we can grow with.”**