

Davies Agency, Inc.

Discover how The Davies Agency grew 300%, streamlined compliance, and saved time and money by switching from spreadsheets to AgencyBloc's AMS+ and Commissions+.



The Davies Agency is a General Agency (GA) for Medicare and individual insurance in New York. Its four locations are primarily in Western New York, where it assists those turning 65 and those looking to switch their Medicare coverage.

The Problem

For years, the Davies Agency managed its business using Excel spreadsheets and paper files. "We had folders and filing cabinets filling the basement." They started as a husband and wife operation. However, as they looked to grow and expand, they realized the need for a more mature process to manage their book of business. "Commissions were difficult, and we couldn't run any reports. Each person was in charge of their own bookkeeping, which created a lot of issues." One of the owners came from a carrier background where they used a CRM and championed that need for their organization.

Our Solution

The Davies Agency knew they needed to make a change, but they wanted to ensure they chose a solution that made sense for their agency, industry, and future. "Compliance, commissions, and reporting tools were our top priorities. We wanted a solution that could help us maintain our bottom line. Likewise, we need something to help us stay compliant since regulations were changing and those needs were becoming more time intensive." Additionally, since The



Specializes In
Medicare, Individual/Family
Health, Life

Agents
15

Website
daviesagency.net

300%
growth in
policies
sold

\$3,000
per year saved
in subscription
fees

\$12,000
recovered
in missing
commissions

“We’ve been able to grow as an agency using AgencyBloc. Once we had the system under our belt, we felt confident that we could bring on others without the worry of losing things in the process. We’re excited about the future and our potential.”

Kellie G. | Davies Agency, Inc.

Davies Agency was coming from paper, they wanted a platform that could connect with their other future solutions, like quoting and enrollment tools.

The Result

Since coming to AgencyBloc in mid-2022, The Davies Agency has **seen a 300% growth in their policies sold and grown their agent base from 3 full-time agents to 15.** “AgencyBloc has given us so much peace of mind in the integrity of our data. We’ve had two audits since 2022, something we never had before. **We easily found all the data we needed and could quickly export that data right from AgencyBloc.** It’s been a huge relief.”

When The Davies Agency set out to look for a CRM, they wanted something that would help them stay compliant. They send the Scope of Appointment (SOA) forms directly from AMS+ to their clients to prepare for meetings and can easily pull them up for walk-ins, making compliance much more manageable. “The SOA functionality is huge. We could’ve never supported the 48-hour rule and our growing book of business while staying compliant using spreadsheets.” They also love the built-in phone recording functionality. Using the VoIP tools in AMS+, they were able to eliminate their third-party phone dialer, **saving them an additional \$3,000 a year in subscription fees and 2-3 hours a week in moving recordings, notes, etc.** Additionally, the VoIP tools are supporting The Davies Agency’s new goal of becoming a call center in the near future.

Soon after purchasing, The Davies Agency set up the Commissions+ solution and started tracking commissions, managing payments, and ensuring accuracy. “The first time we ran the Commission Not Received Report, we ran it for 3 months of one year and **uncovered nearly \$12,000!**” The Davies Agency can **upload all their carrier statements and reconcile commissions for their entire agent base in less than 1 day each month.** “I used to spend 15 hours a month supporting one agent for commissions processing. With Commissions+, I can now support our 15+ agents and growing carrier base in half the time.”

Another crucial piece is reporting. The Davies Agency can now run the reports they need to analyze their book of business and ensure they stay on track. They particularly like the reports on lead sources, policies added during AEP, policies by carriers, and policies by coverage type. They’ve used these reports to identify individuals affected by carrier and coverage type changes, then connected with the affected individuals using the built-in email marketing tool in AMS+. “Having the list of people and emailing tools in AMS+ **saved us at least 50 hours** in reaching out to our clients individually.”

The Davies Agency is excited to take the next steps and looks forward to a year of exponential growth, which they know they can support with AgencyBloc’s AMS+ and Commissions+ solutions.