

## Earn It Agent

Earn It Agent shares their experience of moving from spreadsheets and paper files to AgencyBloc's industry-specific agency management system and how the platform has helped them grow their business through improved organization, automation, and efficiency.



**Specializes In**  
Individual Insurance,  
Medicare, Small Group

**Previously Used/  
Considered**  
Spreadsheets

**Employees**  
1

**Agents**  
1

**Website**  
[earnitagent.com](http://earnitagent.com)

We spoke with Earn It Agent in 2020 about their experience transitioning to AgencyBloc, and again four years later about how they've continued using the platform to support their growth. Based in Utah and licensed in 13 states, Earn It Agent specializes in individual, Medicare, and small group insurance.

### The Original Problem

In the early years of their life and health insurance agency, Earn It Agent relied on spreadsheets and paper files to track their business. However, they began facing issues trying to manage their growing database. With spreadsheets, Earn It Agent found they weren't able to easily search for records, access their data on the go, efficiently organize their data, or perform meaningful analysis. "We started looking for a CRM because we knew there had to be a better way to manage our book of business."

### Our Solution

"We needed something that was made for our industry." Earn It Agent did their due diligence comparing multiple software solutions, including AgencyBloc, to find their right fit. "Ultimately, it came down to the fact that AgencyBloc is specifically made for the life and health insurance industry. Additionally, we looked at the reviews from

**\$40,000**  
saved per year  
with Automated  
Workflows in AMS+

**14%**  
year-  
over-year  
growth

**100%**  
increase  
in client  
communications

**“We can accomplish significantly more with fewer staff members, and stay compliant. It relieves a lot of the mental stress that comes with owning and running a growing insurance agency.”**

**Mark W.** | Earn It Agent

current users and found many positive ones. In our opinion, AgencyBloc was the most impressive option we saw.”

## The Result

“As we continue using AgencyBloc, we’ll be able to grow our business more because of the efficiencies it affords us.” Earn It Agent has experienced significant time savings in customer service, organization, and locating information. “We’ve **increased our client communications by 100%**. We send out age-in alerts, birthday cards, policy check-ins, and enrollment season announcements.” They spend **75% less time locating and searching for information**, which helps streamline customer service and makes their days more efficient. During the enrollment season alone, **they save \$5,000 in employee time** spent locating and updating information. An increase in communication and improved organization have helped Earn It Agent **cut its client churn in half**. “We’ve grown our book of business because we simply have more time. We’re spending more time selling and less time on the paperwork. And we’ve learned a lot. Once we came to AgencyBloc, we were able to pull reports and learned that we had a far bigger Medicare book of business than we knew.” Earn It Agent is excited to continue exploring the features within AgencyBloc that they can leverage to help them pursue their goals and grow their business.

## 4 Years Later

Since partnering with AgencyBloc in 2020, Earn It Agent has continued to grow their book of business and in-force policy saturation. Currently, they are **tracking at 14% year-over-year growth** and have recently added their 14th state to their list of available sales areas.

Due to the efficiencies AgencyBloc’s platform has brought to their team, they have been able to maintain their two-agent operation. “If we were still using spreadsheets, this growth would not be possible without hiring more people. AgencyBloc solutions are why we have been able to go this long without adding headcount.”

## The Impact of Partnering with AgencyBloc

Earn It Agent relies heavily on referral marketing; it has been the primary driver of their consistent annual growth. They use AMS+ to track all of their referrals. “We have referral pushes built into our Automated Workflows and track the referrals in AMS+ so that we can send out referral business cards. We used to spend **\$3,000-\$4,000 a year on marketing**, but our **ability to manage and grow referrals has eclipsed that need completely.**”

In addition to referral management, Earn It Agent also uses Automated Workflows in AMS+ to manage other processes, including turning 65 notices, birthday greetings, appointment scheduling, enrollment

season updates, policy submission status notifications, and post-enrollment season tax reminders. “The workflows in AMS+ have been hugely helpful to our growth. The automations keep us from having to spend a lot of time on busywork, like sending emails, **which saves us a minimum of \$40,000 a year.** They also help us stay compliant and keep all of our data centralized.”

## **What’s Next**

After years of scaling their business without adding headcount, Earn It Agent is now in an exciting position: they’re ready to grow their team by choice, not necessity. “We are getting ready to start hiring for a new full-time person to join our crew.” With another Annual Election Period (AEP) on the horizon, Earn It Agent feels confident and well-positioned to bring on, onboard, and prepare new talent to match their momentum. Other goals for Earn It Agent include adding AgencyBloc’s Commissions+ solution and Rx Collect tool within AMS+ to continue helping them streamline processes and build their business.

