

Client Interview | ISU Stephen B. Marvin Insurance Agency

Client Quick Facts:



ISU Stephen B. Marvin Insurance Agency
www.marvinins.com/



Specializes In:

- Personal Lines
- Commercial Lines
- Employee Benefits



Previously using:
GBS, Zywave



Note: AB denotes AgencyBloc and SR denotes Sherri Roberts, Health & Life Department Consultant for ISU Stephen B. Marvin Insurance Agency and Owner of Sherri Kaye Health Insurance Services

About The Company

AB: Tell me about your company.

SR: ISU Stephen B Marvin Insurance Agency has been in business since 1912—over 100 years! We are a family-owned and operated full-service agency that handles personal and commercial lines, bonds, employer benefits, individual life and health, and Medicare.

AB: You also have your own book of business?

SR: Yes, I've been working in the health insurance industry for over 11 years. In 2010, I started my own agency in Northern Idaho, then Northwest Montana. I have limited my focus to employee benefits and the senior market

The Problem

AB: Why were you seeking a new AMS?

SR: ISU Stephen B Marvin Insurance Agency has used P&C-specific software for many years, but the software couldn't meet our needs to track our health insurance business. Other P&C-specific systems either did not accommodate health insurance or required extra fees to track it. Usually, we were required to document our health information in notes which aren't searchable or able to be reported on.

AB: Did you use any other CRM before AgencyBloc?

SR: We moved the health insurance side of our business to GBS which was acquired by AgencyBloc in 2017. GBS was going to be sunset, so we were back to square one.

Originally, we elected to move to Zywave. The transition took three months and required a significant workload addition to our staff. Once we finished the import, however, we found the system didn't truly meet our needs nor had the capabilities we required to maintain our current level of business. Additionally, due to how locked down the system was, we did not have any flexibility.

Switching to AgencyBloc

AB: What brought you to AgencyBloc?

SR: We made the decision to move to AgencyBloc for many reasons:

- The system is in the cloud and accessible anywhere with an internet connection
- The support staff that we were familiar with at GBS had transitioned to AgencyBloc
- The ability to import commissions freed up valuable time to focus on sales and service
- Custom Reporting
- Automated Workflow
- How AgencyBloc connects individuals (relationships, group contacts, beneficiaries, etc.)
- Tracking for agents, including licensing and contracting

AB: How long did the data migration to AgencyBloc process take?

SR: We worked with the same support staff we had originally at GBS to migrate our data directly from GBS to AgencyBloc. Our database was copied and imported within 24 hours! Stress Free!

“AgencyBloc has everything we need: flexibility, accessibility, commissions tracking, and ease of navigation. The data migration was stress-free, the customer service is awesome, and we love how simple it is to connect individuals, enter data, and just plain run our business!”

After Switching to AgencyBloc

AB: How long have you been with AgencyBloc?

SR: For my personal book of business, I've been with AgencyBloc nearly 2 years. I was one of the first to convert after the acquisition. ISU Stephen B Marvin has been with AgencyBloc for just under a year.

AB: How does your company run differently vs. how it ran before AgencyBloc?

SR: The whole staff has been very pleased with it. AgencyBloc has been wonderful at training myself and my staff. Plus, the ease of navigation is great for training new employees. We are always finding little things in AgencyBloc that gets us more excited!

The simplicity of the importing and mapping feature has brought raving reviews from the Accounting Department. The Management Team likes that they can pull reports with only the data they would like to see and manipulate it in an Excel doc. Our staff loves the flexibility and ease of navigating the system. Those working remote and agents like the easy access to the database and not being slowed down by VPN or Remote Desktop connections.