

Advantage Insurance Group

See how Advantage Insurance Group uses AMS+ and Commissions+ solutions to 4X their book of business, grow in-force policies by 83%, streamline operations, and save \$36K+ annually through automation and tool consolidation.



Specializes In
Medicare, Annuities, Life Insurance

Previously Used
Spreadsheets

Agents
5

Employees
2

Website
iwtapa.com

Founded in 2007, Advantage Insurance Group is an independent agency located in Pottstown, PA. They focus on the senior market, primarily selling Medicare Supplements, Medicare Advantage, annuities, and life insurance.

The Problem

From their inception, Advantage Insurance Group relied on Excel spreadsheets to manage their business. “Back in the day, everything for insurance was in spreadsheets. It was problematic. We kept everything. We had to update all of our data manually. We had spreadsheets everywhere, and they were growing inches thick as the years went by. Our rooms were full of paper. Finding information was a task in itself.” Early on, Advantage Insurance Group knew that making the leap to digital was essential and wanted to be a part of the early adopters of CRM technology.

Our Solution

When Advantage Insurance Group started their search in 2014, there weren't a lot of options on the market. “One of the biggest differentiators AgencyBloc offered was unlimited storage. We wanted to store all of our data in our CRM, and we knew that the amount would compound over the years. It's often overlooked, but storage is essential for insurance agencies, and AgencyBloc offered

\$30,000

saved per year
in front office
employee time

\$6,000

saved yearly
in subscription
fees

83%

increase
in in-force
policies

“My experience with AgencyBloc has been easy and convenient. AgencyBloc has been right alongside us in growth, and their innovation has been exceptional. They think about things before we do and help us navigate changes to positively impact our business.”

Benjamin M. | Advantage Insurance Group

us the space we needed to grow.” In addition to storage, they chose AgencyBloc’s solutions because they are easy to use and affordable for the value they offer.

The Data Migration Process

With their purchase of AgencyBloc’s platform, Advantage Insurance Group needed to digitize every single record. They hired an administrator to scan every file, upload them, and populate the data in AgencyBloc’s AMS. It was time-consuming, but essential for their agency to fully adopt AgencyBloc’s solutions.

The Result

“It was a big shift from all paper and filing cabinets to a digital platform, but it was a necessary one for the future of our business.” Advantage Insurance Group has been a Member of The Bloc for over 10 years, and they continue to find benefits to this day. Since joining, Advantage Insurance Group has **grown their book of business 4X and increased their in-force policies by 83%**. “We can do so much more because we don’t have to worry about managing stacks of paper. We’ve grown our business to provide every service a senior insurance client might need — life insurance, Medicare, ACA, investments, tax prep, accounting, legal, and P&C.”

Data security is a non-negotiable for Advantage Insurance Group. “We’ve been vetted by banks in the past, and AgencyBloc meets all of their requirements. We never have to worry about a data breach. If we were to be audited, we feel prepared because we have all of our data safe, secure, and at our fingertips.”

For many years, Advantage Insurance Group used the base features of AgencyBloc’s solutions. However, they have started to increase their usage since the launch of AMS+ in 2024. They’ve adopted Automated Workflows and began to use Rx Collect in 2025. Combining the power of these features, they **project a savings of \$30,000 a year in front office employee time**. Likewise, they have recently consolidated their tools and adopted the VoIP phone system in AMS+. This consolidation **saves them over \$6,000 a year in subscription fees and provides them with industry-specific tools and unlimited storage**. “We’ve saved \$6,000 now, but the savings will only compound. Our previous VoIP solution would bill us for storage and increase the bill whenever we increased our storage. Over time, that price would’ve significantly increased.”

Advantage Insurance Group is excited to continue adopting more features in AMS+. They have been Members of The Bloc for over 10 years and plan to stay for 10+ more.

