



THE PROBLEM

Like many in the industry, Agent Equity group faced trying to make a generic CRM function for their specific agency needs. To help in customization, they installed an insurance industry template overlay on Salesforce. However, they found the setup was more geared for financial services and P&C and added low functionality for a life and health FMO business. The other major hurdle they faced was their Salesforce subscription did not include a commissions module. They considered building their own, but the base price for just the build was \$50K alone—not including maintenance and future growth needs. Although Salesforce is endlessly customizable, they realized that it would not scale with them, therefore limiting the future growth of their agency.

“Take the advice from the agencies that have adopted AgencyBloc; most of them have done their due diligence and they chose AgencyBloc. The big players in the industry are using it, so trust in their choice to use AgencyBloc.”

Brian P., Agent Equity Group

OUR SOLUTION

Agent Equity Group did their due diligence and inspected over 30 different systems to compare and contrast functionality on every level. “Ultimately, it got to the point that we needed something specific to our industry, and AgencyBloc was it for us.” For them, a commissions module, custom fields, and customizable reporting were a must, and AgencyBloc was the only option that offered all of this and more. In addition, they saw great potential to create seamless processes using the automation capabilities within AgencyBloc. “From the beginning, we saw that AgencyBloc had such a high level of functionality that makes us excited as we grow.”

THE RESULT

After a year and a half, one of the biggest things Agent Equity Group appreciates is the fact that AgencyBloc is made for their industry. “We don’t have to reinvent the wheel; instead we can rely on the collective experience and expertise AgencyBloc has with the industry.” They’ve found savings across the board from **75% less time spent on commissions processing to 50% less time spent on reporting**, totaling a savings of over **\$50K annually**. With AgencyBloc’s Custom Reports, they can do deep dives into their data to thoroughly understand business performance to make more informed decisions for next steps in their growth. With AgencyBloc’s help, **their book of business has grown by 40%**, and they project an additional tenfold growth over the next 12-18 months. “Streamlined processes, accountability, and functionality will make a major impact on our projected growth.” They use AgencyBloc’s Automated Workflows to set up standard operating procedures for processes like agent and client onboarding as well as automation for reminders like birthdays, agent licensure renewals, and policy expiration notifications.



Agent Equity Group is an FMO based in Grand Rapids, Michigan. It was created by agents for agents to help provide top-level training, contracts, and profit-sharing.

 Agent Equity Group
agentequitygroup.com

 # of employees: 5
of agents: 100+

 Specialize in:

- FMO/IMO
- Medicare
- Compliance

 Previously using:
Salesforce