



THE PROBLEM

For 6 years, Doreen Mason, VP of Operations at Business Benefits, Inc., used Zywave to manage client data. But she found the Zywave system to be counterproductive. As Mason said, “We used Zywave as little as possible. The system was problematic because of difficulties with uploading, recording, maintaining, and even finding basic client and prospect information within the platform. We still had to rely on paper files and spreadsheets.” And because of the data tracking inefficiencies, BBI couldn’t effectively run reports or perform data analysis. “We didn’t even deal with reporting. We couldn’t get that far because everything was so difficult. It just wasn’t user-friendly, no better than guesswork.” In addition, commissions processing in Zywave was too convoluted; thus, BBI relied on a second system, Commission Tracker.

“When we moved to AgencyBloc, we found both historical and current data, and all our client communication were all in one location. It was a major improvement in our processes and also in our agency.”

Doreen M., Business Benefits, Inc.

OUR SOLUTION

Business Benefits, Inc. wanted a “one-system solution” that they use throughout their agency. They started their search online for an “employee benefits broker contact database,” which led them to AgencyBloc. Mason said, “All the client data, including commissions, can be housed in AgencyBloc. So, we can run everything together, tie them to clients, and run reports—that’s all just awesome!” From the first sales call, BBI found AgencyBloc to be user-friendly, which excited them. “AgencyBloc’s sales department was amazing. They helped us see the whole picture and presented the software really well.”

THE RESULT

One year later, Business Benefits, Inc. is so happy to have one centralized system. “Having everything in one system together is a massive improvement. AgencyBloc is a HUGE time saver for us in locating information. We’re all in it daily, and we all use it daily,” says Doreen. BBI has found significant time savings in locating, updating, uploading, and maintaining data. Their entire team **saves over 40 hours a month** with AgencyBloc’s industry-specific CRM—a **monthly savings of \$4,000**—which more than pays for their monthly subscription. Since all of their data is in one system, they can now run the analysis and reports they need to analyze revenue, strategize on sales initiatives, and dive deeper into their commissions. Having everything in one place and tied together has been paramount for BBI, and they’re excited to continue growing with AgencyBloc.



Business Benefits, Inc. (BBI) resulted from a merger of two competing Massachusetts-based benefits agencies in 2018. Since 1992, the staff at BBI has served clients throughout the United States, focusing on full-service benefits solutions for companies of 20 - 250 employees.

 Business Benefits, Inc.
www.bbibenefits.com

 # of employees: 14
of agents: 8

 Specialize in:
• Employee Benefits

 Previously using:
Zywave