



THE PROBLEM

The major problem Boomer Benefits faced with their legacy system, GBS, was an overall feeling of inefficiency. The system could not tie information together (husband to wife, child to parent, policyholder to policy, etc.) and lacked a carrier or product tab to better track and manage their products and coverages. The reports from GBS “weren’t visually appealing; plus, they were tedious, manual, and time-consuming to pull.” Commissions processing was slow, requiring 60+ hours a month of work from a contracted employee. Lastly, tracking and managing their clients was overly manual and inefficient.

“We love the product and all the efficiencies we have experienced with the workflow process and reporting options that AgencyBloc provides us. This database conversion was the easiest transition we have experienced in reference to moving data from one database to another. AgencyBloc is very user-friendly and if we ever have a question, they are quick to respond and provide a resolution.”

David K., Boomer Benefits

OUR SOLUTION

Boomer Benefits realized they needed a system that could help them be more efficient and that would facilitate growth. “AgencyBloc is a lot simpler and a lot faster than GBS.” The ease of navigation is invaluable for them. They’re able to quickly locate the information they need, whether it’s client- or policy-related, all within the same client detail screen. Additionally, the flexibility to build and create custom reports is essential. Lastly, AgencyBloc’s streamlined Commissions Processing Module was a must-have to help them reduce time and better allocate resources.

THE RESULT

“We would have switched to AgencyBloc years ago if we had known all of the benefits we’d find.” Boomer Benefits has increased efficiency throughout their agency. They’ve been able to **gain back 50% of their time** creating reports on the information they need. In large part, this is due to AgencyBloc’s Custom Reports and the thorough client detail screens. “Everything we need is right at our fingertips. We don’t have to toggle around to find client-specific or policy-specific information.” Their commissions department has reduced their time spent processing commissions by nearly **95%, saving them over \$1,100 a month.** AgencyBloc’s Commissions Module and Automated Workflows have helped them reduce errors and have **saved them upwards of 4 full business days each month.**



Boomer Benefits was founded in 2005 in Fort Worth, Texas. Since then, they’ve become an award-winning insurance agency for national carriers and made it their job to know everything there is to know about Medicare and the Baby Boomer market.

 Boomer Benefits
boomerbenefits.com

 # of employees: 25
of agents: 30

 Specialize in:
• Medicare
• Ancillary Products

 Previously using:
GBS