

AgencyBloc Case Study

Learn why Brystra Insurance Services originally chose AgencyBloc and where they are now, 6 years later.

THE ORIGINAL PROBLEM

Brystra wanted to be able to present themselves in a professional manner to their contracted agents and other partners, combine both their CRM and commissions processing, provide access for their agents to see their individual books of business and commission statements, and needed a system with a support staff that would be easy to work with and contact. Brystra also sought a system that could grow with them. Originally, they were using Salesforce for finance with a Velocity plug-in (CRM), but it wasn't scalable for them due to the cost for each user. They tried Zoho, but it wasn't the right fit. They seriously considered Gen4, but Brystra felt that the service was unfriendly and the system was visually out-of-date. They experimented with Vertafore but experienced the same problem with cost per user as Salesforce—they couldn't control costs by allowing only partial access (commissions or agent-CRM) to certain users at a lower price point. In addition, they found the appearance to be visually overwhelming and thought it would require too much training for their agents as they quickly grew.

OUR SOLUTION

AgencyBloc's easy-to-use software, tiered agent pricing system, and tracking capabilities were a must-have as Brystra continually hires new agents. The ability to combine both their CRM and commission processing into one platform was invaluable, and the individual support from AgencyBloc's Client Success Team made the transition and onboarding easy. Everyone at Brystra Insurance Services always felt like AgencyBloc made time for them.

THE RESULT

After one year with AgencyBloc, Brystra is able to present themselves at the professional level they need to their partners and contracted agents. One of the greatest advantages they have found with AgencyBloc is their ability to be transparent, not only with their partners and clients but also with their employees, by having all of their information in one centralized location. They can provide detailed commission overviews for their agents and partners, as well as renewal reminders to their agents.

ABOUT

We spoke with David Bryant of Brystra Insurance Services in 2016 about their experience coming to AgencyBloc, and again in 2022 about how they have continued using AgencyBloc. Brystra Insurance Services is located in California and New York and specializes in employee benefits.

SPECIALIZES IN

Employee Benefits

WEBSITE

www.brystra.com

PREVIOUSLY USING/ CONSIDERED

Salesforce

Zoho

Vertafore

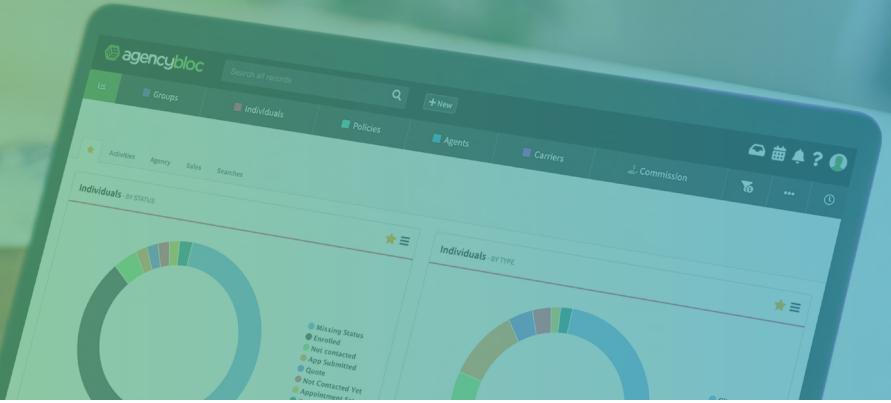
Gen4

EMPLOYEES

6

AGENTS

150+



for E&O and licensing. Brystra finds that one of the best features of AgencyBloc is their individual attention to their clients and their desire to improve their system.

6 YEARS LATER

The general theme for Brystra Insurance Services over the last six years since adopting AgencyBloc has been refinement. They've focused heavily on specializing and creating processes that make their efforts the most efficient possible. "We've shifted our focus from 'we're a startup, and everything is on fire.' We've grown consistently year over year and have established systems and processes in place, which is huge. **Our business has grown 12 times what it was in 2016.**" Although their core team hasn't grown as much, their processes help them better utilize their time, thus making their efforts significantly more effective, even as their workload has increased.

THE IMPACT OF USING AGENCYBLOC

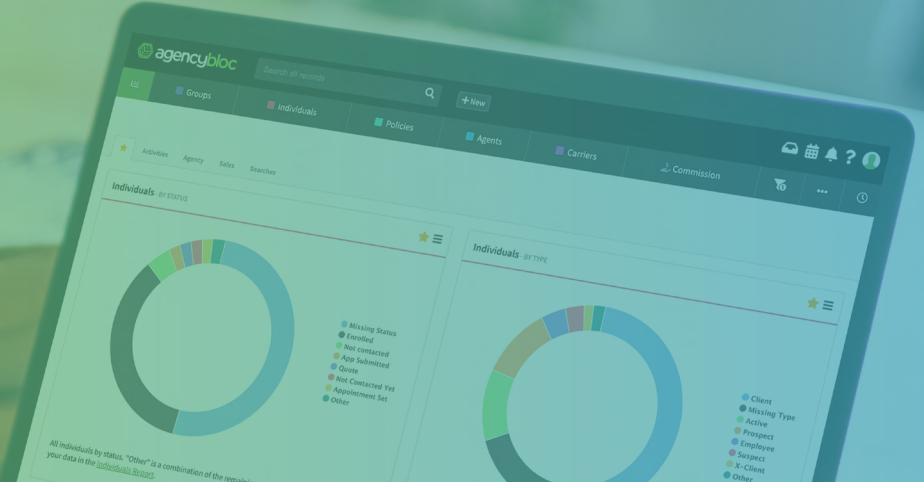
"Profitability. With AgencyBloc, we can operate profitably. Without a system dedicated to servicing your clients, churn is much, much higher. **We maintain a 97% client retention rate**, and, in large part, it's due to AgencyBloc." Brystra Insurance Services relies on AgencyBloc to manage its sales initiatives and service efforts. Tracking all of that information is essential, and without AgencyBloc's robust system in place, they wouldn't have experienced the same level of growth. "Our staff wouldn't be able to do what it does without AgencyBloc."

The other impacts made have been organization and improvement. "You always want to improve and make today better than yesterday. **AgencyBloc's consistent enhancements to their program allow us to continue improving our processes and refining our day-to-day operations.**" For Brystra, organization is essential, and AgencyBloc helps them stay organized, whether it's new data or legacy data. "The notes we've built in AgencyBloc have saved our clients and us on multiple occasions. They're a detailed record of what's happened, and we can rely on them."



TOP AGENCYBLOC TOOLS BRYSTRA INSURANCE SERVICES USES

AgencyBloc's Sales Pipeline has been a game changer for Brystra Insurance Services. Before the launch of the Sales Pipeline, Brystra contracted with SalesForce to build out a custom pipeline-style system. "It took me two years to build and customize it, but once AgencyBloc launched its Sales Pipeline, we could take that out of our budget and centralize our data in AgencyBloc." Ending their contract with SalesForce saves Brystra **\$9,000 a year** in subscription fees. Likewise, centralizing their data has made managing each sales opportunity's entire journey easier. This savings equates to **about 10% of the employees' time and saves them about \$5,000 a year**.



Brystra uses AgencyBloc's Sales Pipeline to manage new business, renewal business, and cross-sell opportunities. They heavily use AgencyBloc's Security Groups to ensure the right users have the proper access. They utilize Automated Workflow to help them stay on top of their service efforts and keep their clients top-of-mind with policy renewal reminders and new client assignment notifications for their staff. **Automated Workflow has made managing their backend significantly more streamlined.**

Lastly, AgencyBloc's industry-specific AMS has helped them focus their efforts on their core business type: employee benefits. Using AgencyBloc, **they can easily manage their 100+ carrier contracts and hundreds of carrier contacts to improve their carrier relationships.** This helps them reach their goals by allowing them to be experts in their industry and better focus on what's important: selling and servicing.

WHAT'S NEXT

Now that they've ironed out their processes and streamlined their efforts, Brystra will continue to focus on what they do best. They are excited to see the continued enhancements in AgencyBloc and will continue to adopt them to bring further efficiencies to their business. One enhancement they're particularly excited about and will start to explore is AgencyBloc's Zapier integration.

"When we started with AgencyBloc, we were looking for someone to grow our business with. 6 years later, they've exceeded that expectation. They continue to be a partner that helps us build our profitability through their services."

The best way to see how AgencyBloc could benefit your agency is to [request a personalized demo](#).