



AgencyBloc Case Study

See how Cerva, Browning, Quinn, & Co. (CBQ) has seen significant time and money savings by utilizing AgencyBloc's commission module.

THE PROBLEM

CBQ had used Zywave's various products, including BrokerageBuilder, since the early 2000s. However, after years with the product and minimal updates to the features they used, CBQ decided it was time for a change. One of the major contributors to this choice was Zywave's feature packaging model. "You either kept everything or lost everything. If we kept the only feature we wanted, the price would increase to nearly the same amount as the package." CBQ felt that the user interface wasn't user-friendly, the available features were not maintained nor updated, and the pricing structure wasn't feasible for their agency. "We felt stuck. We couldn't just buy one tool. We had to buy a package. Then we were paying for features we'd never use."

On the commissions side, CBQ wasn't able to import carrier commission statements or track commission splits using Zywave.

They had to manually input statements line-by-line and check split calculations, making the process incredibly time-consuming. They could only pull one standard report for their commissions. They would then manipulate it in Excel to find the information they needed, which took additional time and resources.

OUR SOLUTION

To start the process of switching, CBQ searched the web for a new agency management system. "We wanted a solution that was industry-specific, had everything in one place, and didn't cost a fortune." They did demos and trials with multiple software platforms but chose AgencyBloc for the UI, customization capabilities, and the price. "We can customize AgencyBloc for what we need. **It is ours.** Plus, everything is in one place; we don't have to go to multiple websites or deal with lots of navigation. And the price is awesome!"

ABOUT

Cerva, Browning, Quinn, & Co. (CBQ) has been servicing Utah and several other states for nearly 40 years. CBQ focuses on connecting their clients with the best group, small employer, and voluntary benefits.

EMPLOYEES

12

SPECIALIZES IN

Group Benefits

AGENTS

3

PREVIOUSLY USED

Zywave,
BrokerageBuilder

WEBSITE

cbqco.com



100%

confidence in
their data



85%

less time processing
commissions



\$9,000

saved annually in
employee time



THE RESULT

“AgencyBloc is a great product and very easy to use. It’s a lot easier to maneuver in.” CBQ recently celebrated their first anniversary as a Member of The Bloc. Since Zywave and AgencyBloc offer comparable, industry-specific systems, it didn’t take CBQ long to get up and running. “Managing and updating our contact information is easier in AgencyBloc. We love that you can add a pinned note to a contact. We have fewer clicks and fewer things to navigate through to update information, which saves us time.” CBQ is thrilled with the communications AgencyBloc sends about new features and updates to existing functionality. “We feel like we’re informed. We haven’t had any issues. AgencyBloc has never been down for us.”

They have seen significant benefits from using AgencyBloc’s Commission Module. “What took 2 weeks to process in Zywave **takes about 2 days to process in AgencyBloc**. We **spend 85% less time processing commissions** and **save \$9,000 annually on employee time**.” Everything is tracked in AgencyBloc, including splits, which improves CBQ’s data integrity. Plus, they can quickly find and run any report they need in a short amount of time. A favorite report is the agent statement report, which both the internal team and downline agents find valuable.

CBQ is excited to start exploring AgencyBloc’s Sales Pipeline and expand their use of AgencyBloc’s Automated Workflow. “We don’t use the workflow feature a lot, but it does remind us to update information, which gives us **100% confidence that our data is accurate**.”

“AgencyBloc is easy. We’ve had great service—the AgencyBloc team reaches out, and we feel supported. We have no complaints.”

—Kaddyne L., Cerva, Browning, Quinn, & Co.

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