



AgencyBloc Case Study

Learn more about how Coordinated Benefits Company uses AgencyBloc to be more efficient and save time and money.

THE PROBLEM

Coordinated Benefits Company wanted to streamline their efforts and make their processes more efficient throughout their agency. Over time, they realized they were doing many tasks manually in previous CRMs they had used, like GBS, Microsoft Dynamics, and Gen4, that they wanted to automate. While discovering these pain points, they also found difficulties with the commissions processing tools. They weren't able to differentiate their coverage types, which proved troublesome as they are a full-service employee benefits agency with many policies and coverage types. "When you are trying to structure your CRM and you need support, sometimes chat or email is not enough. You really need to talk to an expert and have a dialogue."

OUR SOLUTION

"We talked to colleagues and heard about AgencyBloc through word of mouth, and they told us how everything worked." Their checklist for a new management system included workflow automation capabilities, commission tools that tracked multiple coverage types, the ability to navigate between different types of business (i.e., groups to individuals), and a reliable support team. "After a demo with the sales team, we were impressed. We had confidence that the system would work the way we needed it to and that we would be able to navigate it with ease. Also, there was no need for a significant upfront investment to create the structure we needed from a CRM."

ABOUT

Since 1983, Coordinated Benefits Company has been helping clients develop employee benefits strategies aimed at attracting and retaining the highest quality employees.

EMPLOYEES

10

SPECIALIZES IN

Employee Benefits

AGENTS

15

PREVIOUSLY USED

GBS, Microsoft Dynamics, and Gen4

WEBSITE

cbcco.com



50%

reduction in time processing commissions



10

hours per week saved in communication



\$20,000

saved in employee time



THE RESULT

“Normally, after we sign the contract, we’re on our own. **Not with AgencyBloc. We had support immediately, and it’s been huge for us.**” Coordinated Benefits Company started making their agency more efficient right away, using AgencyBloc’s Automated Workflow tool to help them manage their processes. They have over 30 workflows set up to automate group new hire onboarding, policy renewals, opportunity management, and more. “We’re able to be more proactive with our management. **We save 10 hours a week in sending communications with our new client workflows,** and our data integrity has improved significantly. More than that, the Workflows have helped us stay compliant and create connections with our clients outside of just renewals.”

On the commissions side, Coordinated Benefits Company **has cut their time processing commissions in half.** “We really like the importing tool and the mapping capabilities. You match it once, and it’s done. It’s easy.” They can now break down their revenue, answer critical questions like how much they made from each employer group, and drill down to the specific data they need.

A big win for Coordinated Benefits Company has been AgencyBloc’s Sales Pipeline. They use the Sales Pipeline to manage all their new and renewal business to ensure they stay compliant and on top of their sales. “It’s an amazing tool. We used to manage all of our sales in a spreadsheet, but now it’s in AgencyBloc, and the entire team can see it and address issues during our morning check-in meeting. **With the Workflows and the Pipeline, we save \$20,000 in employee time.** But it’s not just the time. **These tools protect us, protect our clients, and help us retain our clients.**”

“AgencyBloc has allowed our firm to improve our efficiencies internally as well as offer our clients a higher level of service and personal touches. We have leveraged activity tracking to manage the tasks we complete for our clients, workflows and pipelines to automate our basic agency processes, and commission management to better access the source of our revenues which helps us prioritize our most valuable clients.”

—Jim Patrician, Coordinated Benefits Company

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