



THE PROBLEM

“We had been using our CRM for years. We had been making it work, but it was not a smooth sailing machine, and most people weren’t using it.” Low usage of their agency management system created an issue of data integrity. Without full adoption of the system by their whole agency, they knew their data was never fully up-to-date. “We didn’t use the system because we didn’t think it was very user-friendly and felt the UI was outdated.” Other frustrations they faced were in commissions and reporting. “I don’t think our version had the functionality to process commissions, so we ran them in parallel in Excel spreadsheets. Likewise, reports were not intuitive to pull, and you had to have a certain knowledge level to build the report you needed.”

“AgencyBloc is a constantly evolving CRM that has already improved our processes quite a bit, and we are hoping, with continued updates, it can evolve even more to keep our company as organized and efficient as possible.”

Jennifer B., CSNW Benefits

OUR SOLUTION

CSNW Benefits did their due diligence, tested many different management systems, and weighed the pros and cons to find their best fit. They focused on three things when researching: features, customer service, and price. “We wanted the ability to create processes within the database, commissions processing was very important, an updated and modern UI, reporting that was intuitive and easy to use, and importing capabilities.” Ultimately, they wanted a system that their entire agency would adopt, one that provided exceptional customer service, and one that met their criteria.

THE RESULT

“For us, one of the biggest things is our data integrity. With AgencyBloc, we have super accurate reports which anyone can quickly pull. It’s super transparent. Everyone can get in there and see what they need to see. It’s solid data.” Usage throughout their agency has grown as they love how visually clean and efficient AgencyBloc’s UI is. They’ve built out processes using AgencyBloc’s Automated Workflow and Sales Pipeline to create consistencies throughout their agency and visualize information. “Workflows have helped us streamline our processes, like renewals, to keep our team more organized. Those efficiencies alone **improve productivity by 20%** on average throughout our offices. The Sales Pipeline and how visual it is **has been a game-changer for us**. We use it to see our internal processes and, in the long run, it’ll give us better data that we can use to improve.” AgencyBloc’s Commission Module has streamlined their processing. “The way we can easily import commission statements into AgencyBloc makes the process simple. **We save one day a week in time and \$8,500 a year**. It was very stressful before, and now it’s much more streamlined.” Better revenue tracking allows them to assign “grades” to their clients to see how many they have in each revenue grade. This information helps them understand the makeup of their business and allows them to make more informed decisions about how they can reach their goals.



**BENEFITS FOR
YOUR LIFE & BUSINESS**

CSNW Benefits is a benefits-focused agency specializing in small-to-mid-sized groups, individuals, and 401k management. They serve many companies throughout the Oregon and Washington area.



CSNW Benefits
csnwinc.com



of employees: 11
of agents: 3



Specializes in:
Employee Benefits