



AgencyBloc Case Study

See how Earn It Agent utilizes AgencyBloc and its features to increase client communication, save time locating client information, and cut client churn in half.

THE PROBLEM

In the early years of their life and health insurance agency, Earn It Agent relied on spreadsheets and paper files to track their business. However, they began facing issues trying to manage their growing database. With spreadsheets, Earn It Agent found they weren't able to easily search for records, access their data on the go, efficiently organize their data, or perform meaningful analysis. "We started looking for a CRM because we knew there had to be a better way to manage our book of business."

"It's like the difference between mail and email. AgencyBloc makes our day less stressful and much more efficient. It simply allows us to get more done in less time."

-Mark W., Earn It Agent

OUR SOLUTION

"We needed something that was made for our industry." Earn It Agent did their due diligence comparing multiple software solutions, including AgencyBloc, to find the right fit for them. "Ultimately, it came down to the fact that AgencyBloc is specifically made for the life and health insurance industry. Additionally, we looked at the reviews from current users and found many positive ones. **In our opinion, AgencyBloc was the most impressive option we saw.**"

THE RESULT

"As we continue using AgencyBloc, we'll be able to grow our business more because of the efficiencies it affords us." Earn It Agent has experienced significant time savings in customer service, organization, and locating information. "We've **increased our client communications by 100%**. We send out age-in alerts, birthday cards, policy check-ins, and enrollment season announcements." They **spend 75% less time locating and searching for information**, which helps streamline customer service and makes their days more efficient. **During the enrollment season alone, they save \$5,000 in employee time spent locating and updating information.** An increase in communication and improved organization have helped Earn It Agent **cut its client churn in half.** "We've grown our book of business because we simply have more time. We're spending more time selling and less time on the paperwork. And we've learned a lot. Once we came to AgencyBloc, we were able to pull reports and learned that we had a far bigger Medicare book of business than we knew." Earn It Agent is excited to continue exploring the features within AgencyBloc that they can leverage to help them pursue their goals and grow their business.

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

ABOUT THE COMPANY

Based in Utah and licensed in 13 states, Earn It Agent is a small agency focused on individual, Medicare, and small group insurance.



75%

less time locating and searching for information



100%

increased client communication



\$5,000

saved during enrollment season