

THE PROBLEM

FARE Healthcare utilized a generic cloud-based CRM for client servicing and Excel spreadsheets for commissions. The two systems were not connected, so their process was extremely manual and time-consuming. Their CRM lacked searchability, made uploading documents cumbersome, and required significant time to update client records. They kept copies of each document on their computer and in their email, creating a nightmare for document management. On the commissions side, using Excel was exceedingly difficult. They couldn't track the accuracy of carrier payments, payouts were hard to manage with different payee schedules, and they were unable to produce complete reports for analysis on their previous 12 months.

“AgencyBloc keeps us organized with regards to our current clients and commissions. It’s a huge weekly time saver.”

Mollie D., FARE Healthcare

OUR SOLUTION

FARE Healthcare searched online and vetted 6 different CRM and AMS solutions. They called references for all of their top contenders. The responses from AgencyBloc users on how they're able to use the software and why they love it made the decision to choose AgencyBloc. Initially, they planned to put off migration since it was 4th quarter, but they quickly changed their minds and decided to move in the middle of Open Enrollment. “The sooner you can get started, the better. We were confident in our 4th quarter sales and wanted to be able to have a clean slate for January 1. We figured, ‘why put it off?’ It’s never a good time, so just do it.”


THE RESULT


AgencyBloc has helped simplify and streamline many of FARE Healthcare’s processes, but the impact has been the greatest for commissions management and continual client data upkeep. AgencyBloc’s Commissions Module has **cut their time processing commissions by 85%**. They’ve found payee schedules, commission mapping, and rate tables invaluable in making commissions processing significantly more efficient. Their agents love it too because they can now log on to see their commission statements and break them down by earning. They’ve started utilizing the missed commissions feature and have already uncovered inaccurate payments they’re now able to rectify. On the CRM side, they **spend 90% less time locating information and performing necessary documentation**. “AgencyBloc makes it easy to attach documents in the system, so I don’t have to keep multiple files in multiple locations.” They use Activities extensively to make internal communication more effective and pull Activity-based reports weekly to ensure nothing is missed. All in all, AgencyBloc **saves FARE Healthcare more than a day every week** in time spent on commissions, running reports, and updating client files.




F.A.R.E. (Fair and Reasonable Employee) Healthcare is an employee benefits agency specializing in reference-based pricing cost containment solutions for groups of 50+ employees.

 FARE Healthcare
farehealthcare.com

 # of employees: 6
of agents: 3

 Specialize in:

- Employee Benefits
- Life Insurance

 Previously using:
WG Cloud CRM
Excel Spreadsheets