THE PROBLEM

As a GA, GRA Benefits Group's focus is providing the services and support their agencies need. GRA used Microsoft Dynamics for many years but found that the outdated UI structure made many processes difficult, like saving attachments or pulling reports. In addition, Microsoft Dynamics didn't have a workflow automation component to help them manage the steps and processes their services require—like enrollment, quoting, billing, etc. "We didn't have a follow-up system, nothing that prompted us to take the next step. Our services each have a unique set of steps that must be followed in a distinct order." They used a third-party checklist system, Sharepoint, for a while but found they couldn't replicate the processes and would have to manually enter each service's process for every agency for every occurrence. This was time-consuming, frustrating, and confusing.

"The biggest benefit is the ability to maintain the organization and all of our different processes. AgencyBloc has been the most flexible system we've worked with."

Mike Ramsby, GRA Benefits Group

OUR SOLUTION

"It came down between AgencyBloc and another software, but the winning features were the workflow component and the screens. AgencyBloc just looked straightforward and easy to use." The other major factor in their decision was AgencyBloc's Dashboard Analytics. The competitor GRA was considering didn't have a dashboard feature, and GRA saw the benefits of access to high-level graphs, charts, and lists extremely beneficial. "It was hard to find a system that wasn't geared to one agent and their book of business. We're a GA and needed features to manage and report on our multiple agencies and downlines."

GRA Benefits Group provides solutions for employee benefits agencies and their clients. They offer numerous in-house services like their benefits administration, 1Enroll, and support thousands through their Agency Concierge service.

GRA Benefits Group
grabenefits.com

# of employees: 18
# of agents: 2

Specializes in: Employee benefits

Previously using: Microsoft Dynamics

THE RESULT

After a year with AgencyBloc, GRA is thrilled to have all of their business processes centralized in one system. Today, GRA **has over 80 Automated Workflows** set up for new business onboarding, implementation, renewal, COBRA, group management, enrollment season, and have even made carrier-specific workflows to cater to the processes of different carriers. Automated Workflow alone **saves GRA 50 hours a month and nearly $11,000 a year** on internal processes. They find Custom Reports simple and effective and can create, save, and share all of the reports they and their downline agencies need. These efficiencies help them save over **$2,000 a year in building and generating reports**. They love the Dashboard feature and have customized their Personal Dashboards to match their roles. Documents are easier to manage and attach, allowing them to be HIPAA-compliant and more organized. Lastly, GRA is extremely happy with AgencyBloc's customer support staff. "The staff at Microsoft Dynamics was difficult to work with at times, and communication wasn't always stellar. AgencyBloc's chat is amazing. The support staff does a great job at understanding us no matter what we say or how we say it."