



AgencyBloc Case Study

See how the Health Insurance Shop, Inc. processes commissions more efficiently and spends less time running reports with the help of AgencyBloc.

THE PROBLEM

The Health Insurance Shop, Inc. went through a few different agency management software options over the years to find the right system. Previously, they used GBS before switching to Vertafore. “We left GBS because it felt too antiquated and wasn’t user-friendly. Our experience with Vertafore wasn’t as user-friendly as we had hoped. We felt it was primarily designed for group business, so tracking our individual business was very difficult and cumbersome.” Additionally, they tracked their commissions separately on spreadsheets and found creating reports challenging. Both of these processes were time-consuming and tedious for their team.

OUR SOLUTION

“The minute I saw a demo of AgencyBloc, I wanted to buy it.” The Health Insurance Shop, Inc. was looking for a solution that would allow them to track all of their lines of business, navigate between group and individual business, and manage and process commissions in one centralized, easy-to-use system. “One of our GAs recommended AgencyBloc, and it looked very easy to use. I was excited about it from the start.”

ABOUT

The Health Insurance Shop, Inc. has been in business since 1982. They specialize in all types of life and health insurance for both groups and individuals.

SPECIALIZES IN

Individual, Group, Life

EMPLOYEES

7

PREVIOUSLY USED

GBS, Vertafore

AGENTS

5

WEBSITE

buyhealthinsurancehere.com



100%

improvement in commissions processes



100

hours saved monthly running reports



\$18,000

saved yearly with AgencyBloc’s reporting capabilities



THE RESULT

The Health Insurance Shop, Inc. has been a Member of The Bloc since 2021, and their processes are more streamlined. “Having a system where I don’t have to spend days and days training my employees how to use it makes a big difference. AgencyBloc is intuitive and just easy for us to use. There is no comparison.”

The number one piece of functionality the Health Insurance Shop, Inc. needed was to navigate between their group and individual business efficiently. AgencyBloc’s tab navigation simplified this process. They can now see all of their types of business in the same space. “It’s just so much easier in AgencyBloc. **I can’t even put a number to how much time it has saved because it’s so significant.** Again, no comparison.”

AgencyBloc’s Commission Module was crucial for the Health Insurance Shop, Inc. and has significantly impacted their day-to-day processes. “Hands down, the Commission Module has improved our processes by 100%.” The ability to upload their statements is paramount to their success, and they’ve started tracking their missing commissions. **“We’ve already found some errors that have accounted for a few thousand dollars in inaccurate payments.”**

Lastly, the process of pulling and analyzing reports has improved dramatically. “With our last system, I felt I needed a computer science degree to find the information I wanted in reports. Now, I can build the reports quickly and find the information I need.” **They have reduced their time spent running reports by 70%, which equates to 100 hours a month and \$18,000 a year.**

“AgencyBloc has been one of the best decisions I have made for our agency. A user-friendly platform that doesn’t require a computer science degree to navigate, yet sophisticated enough to allow you to gauge your agency’s performance and ensure you’re being compensated properly.”

—Michelle W., Health Insurance Shop, Inc.

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