AgencyBloc

Hilb Group Medicare

See how Hilb Group Medicare uses AgencyBloc's AMS+, Commissions+, and data management tools to centralize operations, drive 10X business growth, increase carrier contracts by 600%, and expand their agent base from 15 to over 130 LOAs.

Hilb Group Medicare is a Field Marketing Office (FMO) headquartered in Richmond, Virginia. Their roots date back to the 1970s when they began selling Medicare, ancillary products, hospital indemnity, and annuities. In 2016, they were acquired by Hilb Group, a Top 20 insurance brokerage specializing in property, casualty, and employee benefits, to expand their Medicare arm.

The Problem

Before 2010, Hilb Group Medicare relied on spreadsheets for all business management. "All of our client data was in spreadsheets. All of our agent contracting information was in spreadsheets. There were spreadsheets everywhere. I don't think people should even start an agency with spreadsheets. It's so messy. **Spreadsheets are just not a good way to run your business.**" Their organization had been in operation for a long time and had experienced significant growth, resulting in a substantial amount of current and historical data to manage. However, they were also in a transition mode. From 2010 to 2011, Hilb Group Medicare began to evolve and leverage technology to support various processes, and they knew it was time to migrate their business to a CRM.

MEDICARE

Specializes In
Medicare, Ancillary, Hospital Indemnity, Annuities

Previously Used
Spreadsheets

Agents
130

Employees
6

Website
hilbgroupmedicare.com

600%
increase
in carrier
contracts

10X
growth in
business
revenue

Our Solution

In 2012, Hilb Group Medicare began their search. "We leverage a variety of different tools to make our business run effectively. We found that many of the systems out there for large organizations weren't interested in building integrations, even for solutions that the CRM didn't provide, which made things very difficult for us." Two other hurdles Hilb Group Medicare experienced were specificity and ease of use. They struggled to find solutions that catered to the Medicare space that were also modern and easy to use. "After a lot of Googling, we found AgencyBloc from a few tech review sites and were impressed with the usability. But the two biggest factors for us were the dedicated customer service and the ability to provide direct feedback to the Product Team."

The Result

"AgencyBloc's solutions are our single source of truth for agent, business, and client data." Hilb Group Medicare became a Member of The Bloc in 2013. In the 12 years since joining, Hilb has navigated a sale of their business, experienced a merger, grown organically, refined processes, and brought commission processing in-house. During this time, Hilb Group Medicare has seen their **agent base grow from 15 to over 130 agents, increased carrier contracts by 600%, and experienced a 10X growth in business revenue**. AgencyBloc's AMS+ and Commissions+ solutions have supported Hilb Group Medicare, enabling them to thrive during mergers, acquisitions, and organic growth.

In 2021, Hilb Group Medicare brought all commissions processing for their organization and street-level agents in-house using AgencyBloc's Commissions+ solution. "Every GA, MGA, and SGA-level agency has its own payout needs. **The payee, payee schedule, and rate table tools in Commissions+ allowed us to create a customizable commissions process** to pay those different levels, while also giving us space to grow our commissions in the future."

Hilb Group Medicare partners closely with AgencyBloc. They take part in AgencyBloc's annual BlocBuilder event, are an active member in AgencyBloc's Customer Advisory Board, and continue to share ideas for additional enhancements and features. Looking forward, they are excited to continue recruiting seasoned agents, build out an agent-focused onboarding program, and see what's next for AgencyBloc's evolving platform of industry-specific solutions.