



# AgencyBloc Case Study

*See how Hovis & Associates uses Sales Pipeline, Automated Workflow, and the Commission Module to create notable time and money savings.*

## THE PROBLEM

Hovis & Associates initially specialized in life and group business, then sold off their group side to focus on Medicare, agent services, and financial services. As their business changed, so did their software needs. “Gen4 is geared more towards the group management side. Managing our agents and individuals in Gen4 required using parts of the system that weren’t built for those entities. This meant we had to manage both agents and individuals in the same area, which wasn’t productive or efficient.”

“Similarly, the commission tool we had couldn’t calculate flat values, overrides, or unique payout structures that are common on the Medicare side.” Hovis ran spreadsheets in parallel to Gen4 to track their commissions and manage their various agent payment structures. However, this proved inefficient and increasingly more cumbersome as they grew. “We had to compare each statement against our records line by line to ensure accuracy. It was incredibly time-consuming.”

Another key problem for Hovis was compliance. “Gen4 would not provide us with a BAA to ensure their systems were up-to-date. With all of the cyber issues and HIPAA regulations, it was no longer a risk we could take.”

## OUR SOLUTION

“When we decided to start looking, we narrowed it down to 16 AMS and CRM options. Then, we put together a list of 10 questions to vet each vendor. Basically, we said, ‘if you can’t answer these questions how we need, then you’ll be cut.’ The process weeded out the options quickly.” They considered a variety of vendors from large to small, generic to industry-specific, and more.

## ABOUT

Hovis & Associates is a long-standing family business based in Festus, Missouri, specializing in Medicare since 2006.

## SPECIALIZES IN

Medicare

## EMPLOYEES

7

## PREVIOUSLY USED

Gen4

## AGENTS

200+

## WEBSITE

[hovisandassociates.com](http://hovisandassociates.com)



**250%**

increase in returned and signed agent attestations



**25-40**

hours saved weekly using Sales Pipeline & Automated Workflow



**\$35,000**

uncovered in missing commissions



They eventually whittled the options down to two systems, including AgencyBloc. “When we were looking at the options and what we could do, it was obvious. AgencyBloc is tailored more to the Medicare side than any other system we considered, so it was the obvious choice. Additionally, one of our uplines recommended the system.” Hovis & Associates were particularly impressed by AgencyBloc’s Sales Pipeline feature for sales process management, the Commission Module, and the availability of integrations within the platform.

## THE RESULT

Hovis & Associates became a Member of The Bloc in 2020, and the changes within their business have been significant.

“The Sales Pipeline saved us during AEP. It just made communication way easier. We use it to manage agents and leads, and we can just see everything now.” The insight provided by AgencyBloc’s Sales Pipeline gave Hovis’ management team the information they needed to pinpoint when they need to hire and anticipate issues during AEP. They connected Automated Workflow to ensure the implemented processes are running as designed. **“Using the Sales Pipeline and Automated Workflow saves us 25-40 hours a week** on internal and client calls and ensuring things are happening when they should. **They’ve helped our sales grow and easily save us \$60,000 a year.”**

In their search for new software, Hovis put a big emphasis on the commissions processing component. “We save so much time using the Commission Module over using spreadsheets. **We spend 75% less time processing our commissions, saving us \$50,000 a year.** We were able to run our first full audit, which **uncovered \$35,000 in missing commissions.**” Hovis has grown their carrier contracts and manages their numerous payout structures and payee schedules all within AgencyBloc. “A big bonus for our business is the data we can access. We increased our overrides with two of our largest carriers because we had the data to back up our production rates.”

Although it wasn’t a main focus originally, Hovis has found the improvements in their client communications substantial. “We love the incorporated Email Marketing feature in AgencyBloc. It has an opt-out button, which is awesome for compliance, and it has all of the analytics we need to track. We use it to communicate with our clients, and since using it, **we’ve increased our returned and signed agent attestations by 250%.**”

The main benefits for Hovis so far have been better access to their data, more insight gained from their data, and improved communication internally and externally. “With AgencyBloc, we can quickly pull reports on anything we need and have it ready to go. The client information is there, and everything is in one place.”

**“AgencyBloc has streamlined our business. Operationally, it saves us time and money, especially with commissions. Our favorite feature, the Sales Pipeline, has become integral to our Medicare AEP success.”**

—Heather H., Hovis & Associates

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