AgencyBloc

HTA Insurance Services

See how HTA Insurance Services uses AgencyBloc's AMS+, Commissions+, and client communication tools to transform their business model, drive 35X revenue growth, uncover $22,000+ in missing commissions, and stay on track to help 75,000 people by 2027.

HTA Insurance Services, formerly Harry Tashjian & Associates, began as a wholesale insurance brokerage in Pennsylvania. In 2017, HTA Insurance Services underwent a change of ownership, and in 2020, changed their business model from a wholesale Field Marketing Office (FMO) to a retail agency focused on long-term care insurance and Medicare products. Today, HTA Insurance Services has two focused sections for P&C (HTA P&C Insurance Services) and life and health (HTA Life & Health Insurance Services).

The Problem

HTA Insurance Services previously used a custom-built version of ACT to track all agent and client data throughout their large book of business. However, as the industry continued to change, they found that their custom system wasn't capturing all of the data they needed, it presented challenges when new fixes and enhancements were introduced, and it wasn't built for processing commissions. "Our custom-built system just became too cumbersome to navigate the constant changes of the insurance industry. We wanted something that was built for the industry but wasn't reliant on us to improve and manage."

HTA
insurance services

Specializes In
Medicare, Life, Health, P&C

Previously Used
ACT

Employees
40

Website
hta-insurance.com

5X
growth in number of written policies

35X
growth in revenue since joining The Bloc

$22,000
found in missing compensation since 2020

"AgencyBloc has helped us streamline all of our daily tasks. The activities and notes have made information more accessible and enhanced our client relationships. It's helped us see measurable results and set goals for the future."

Tracy R. | HTA Insurance Services

Our Solution

"AgencyBloc was recommended to us by one of our trusted FMO partners in the field. They knew many organizations, both downlines and uplines, who were using AgencyBloc's solutions with great success." HTA Insurance Services needed a solution that navigated changing health insurance trends and compliance, was easy to use, and offered commissions processing capabilities. Lastly, HTA Insurance Services was looking for a true technology partner. They are committed to providing exceptional customer service to their clients and wanted a technology vendor that prioritized the same.

The Result

"AgencyBloc's solutions allow us to be nimble, make adjustments quickly, and continue to evolve our business." In early 2017, HTA Insurance Services joined The Bloc, and they haven't looked back. They've leveraged AgencyBloc's solutions to switch their business model from being an FMO to a retail-based agency and have seen exceptional growth. "We started in 2017 with **six employees, and now we have over 40**. We've also **grown the number of written policies by almost 5X**. But the biggest growth we've experienced is in revenue. **We've grown our revenue nearly 35X in the 8 years we've been partnered with AgencyBloc.** Medicare commissions are small — but they add up quickly and our numbers show that story."

With the change from being an FMO to a retail agency, HTA Insurance Services began leveraging AgencyBloc's Commissions+ solution. "Commissions+ gives us peace of mind that our commissions are correct. As a retail agency, commissions are very important. **We've found over $22,000 in missing compensation since 2020.** It also provides us with a foundation to maintain a higher volume and support our continued growth."

HTA Insurance Services uses Automated Workflows and email marketing tools within AMS+ to stay connected with clients and automate communications. They leverage custom fields and customizable dropdown menus to ensure their AMS+ account reflects their needs. "We use the reports in AMS+ to track our progress toward our BHAGs (big, hairy, audacious goals). Our current BHAG is to help 75,000 people by January 1, 2027. We've monitored our progress with AMS+ and we're on track to hit that goal!"