

## Case Study | InsureOne Benefits

### About The Company

Since 2001, InsureOne has been helping the residents throughout Ohio navigate and understand the personal health, family health, and Medicare insurance process.

### The Problem

InsureOne started on GoldMine, a generic CRM, but the system didn't allow them to track multiple policies under one individual. It required multiple contact entries which resulted in a messy database. From there, they transitioned to SugarCRM, another generic CRM, which took nearly a year to customize. This transition was extremely frustrating for InsureOne because their web developer had no prior knowledge of the health insurance world and didn't fully understand their needs. Although the possibilities for customization were endless, they found SugarCRM to be "pretty vanilla" and the customization to be costly. The biggest problem they faced was the lack of a way to track and process commissions. SugarCRM didn't provide them with a commissions platform, so they paid a web developer to build one for them. After spending an enormous amount of money and waiting an extended amount of time for the platform's completion, they learned that SugarCRM's new update wouldn't support any of the customizations they had done. This meant they would have to go through the whole process again and spend even more money. All of the customizations, big and small, were difficult and created multiple hurdles and headaches.

### Our Solution

Because of the changes, InsureOne decided it was time to move. Unfortunately, this meant they needed to move fast as they only had 3 weeks left in their contract with SugarCRM. With

employees that aren't "super tech-savvy," they wanted to ensure the transition was smooth and the new system was easy to use. They considered Excel spreadsheets, but with 10,000 contracts and commission processing needs, they found it impossible to effectively track them all. At first, InsureOne thought AgencyBloc was "too good to be true;" but ultimately chose it for the robust commissions module, the availability of automated workflow, and because "AgencyBloc already knew the business." In addition, they found AgencyBloc's dedication to regular upgrades and improvements to the system unparalleled.

### The Result

InsureOne needed to be up and running in less than a month. In that time, AgencyBloc was able to migrate their entire book-of-business comprised of roughly **250,000 individual records, 75,000 policies, and 25,000 attachments**. Additionally, AgencyBloc was able to create over **750,000 activities** in Automated Workflow so that the agents could get going sooner. Everyone at InsureOne, including the non-technical employees, found the migration to be seamless and the system easy to use and understand. They now have a streamlined approach to tie all related policies and records in one location under one individual. Plus, AgencyBloc has made commissions processing so streamlined that other agents and agencies now ask InsureOne to manage their books of business and commissions for them. Lastly, they're able to stay in better contact with their clients and prospects by utilizing Automated Workflow in AgencyBloc. Now they can stay on top of their leads, inform the turning-65 group of upcoming changes, and keep all their clients and prospects up-to-date about policy-related information.



#### Client Quick Facts:



**InsureOne Benefits:**  
[www.insureonebenefits.com](http://www.insureonebenefits.com)



**Specializes In:**

- Family & Individual Health
- Medicare
- Life



**# of employees:** 10  
**# of agents:** 6



**Previously using:**  
GoldMine, SugarCRM