Case Study | Montgomery & Graham

About The Company

Founded in 1997, Montgomery & Graham focuses largely on group business, employee benefits, and commercial insurance. They integrate both fee-for-service and reference-based pricing to provide the best service and solutions for their clients and prospects.

The Problem

Montgomery & Graham's contract with Microsoft Dynamics included a version of the software that was on-premise and not fully compatible to meet their commissions processing needs. The agency's commission structure includes many splits, a component that wasn't feasible or workable within Microsoft Dynamics. To fulfill their commissions processing needs, they started using Q Commissions and ran both programs concurrently. However, the programs ran independent of one another and required constant imports from one system to the other to pull real-time analysis. The lag time associated with this process was frustrating and provided the leadership team with incomplete data to improve upon for the future. Additionally, the many customizations they built into Microsoft Dynamics impeded flow and compromised functionality as they grew. They had to scale back in their own customizations due to the time commitment each took as it was all done in-house.

Our Solution

Montgomery & Graham first encountered AgencyBloc at Benefits Pro Expo and were thrilled by the idea of a system with both a CRM and commissions processing. "AgencyBloc is the first system we've had where we could really tie in our basic client information and servicing offerings to actual revenue." They appreciated that AgencyBloc is cloud-based as their on-premise version of Microsoft Dynamics required in-office or VPN access and consumed significant resources. With AgencyBloc, they looked forward to better data analysis to truly understand the breakdown of their overall revenue and make informed decisions for the future.

The Result

After 2 years with AgencyBloc, Montgomery & Graham is able to perform more robust data analysis. With commissions and CRM functionalities in one system and using AgencyBloc's import utility, they've streamlined data and information upkeep. This saves their account management staff **30 hours and $750 per person per project**. They use AgencyBloc's Custom Reports to analyze revenue and understand contribution. AgencyBloc has helped them better track group sales and "shift their focus" to larger group sales. They do this by breaking down their group accounts by account manager and by month to understand how each group renewal affects overall revenue. Using this insightful reporting has helped them shift their focus and put together plans to reach their appointed goals.

> *"The greatest value, from my standpoint, is that it has allowed us to do a deep-dive into the analysis of our book of business. It has uncovered things we didn't know and reassured things we thought we knew."*

Client **Quick** Facts:

Montgomery & Graham:
www.mymgteam.com

M&G
insurance · risk management

Specializes In:
· Employee Benefits
· Commercial Insurance
· Individual Insurance

# of employees: 11
# of agents: 32

Previously using:
Microsoft Dynamics