

## Case Study | Milz Health Group

### About The Company

Milz Health Group serves the 65+ market of Wisconsin. The Milz team boasts more than 50 years of experience in the Health and Medicare insurance fields. Located in Milwaukee, Milz Health Group specializes in Medicare, Med Supp, and individual ACA.

### The Problem

Milz Health Group originally subscribed to AgencyBloc's software, but moved to RadiusBob to coordinate CRM systems with his other two business partners. After a year and dissolution of the partnership, Milz found that they were not receiving the support they needed with RadiusBob's software. Specifically, they were disappointed with response times and expertise. Additionally, they were looking for a software that provided the opportunity for expanded integrations for things like lead acquisition, enrollments, referrals, etc. In addition, they found the customization options to be limited since they couldn't fully customize the software to fit them.

### Our Solution

After the split with their partners, Milz Health Group looked again at AgencyBloc's software in addition to other providers to ensure they found the right fit. The ability to fully customize the software to match their needs drew them back to AgencyBloc. In addition, AgencyBloc's partnership with ACAExpress and Rocket Referrals were beneficial since they are both vendors Milz uses currently. Plus, they were excited to see AgencyBloc's willingness to move towards more integrations in the future. However, the two most important features that helped them decide to return to AgencyBloc were the Automated Workflow component and AgencyBloc's "excellent" customer support team.

### The Result

After a year and half with AgencyBloc, Milz Health Group has seen a positive correlation between AgencyBloc's Workflow Feature and their lead conversion rate. They've been able to better manage their policies and individuals by running a variety of reports identifying which of their clients had renewed, which hadn't, and the reasons why (carrier mistake, cancelled, death, etc.). They're also able to work leads more quickly by having the leads directly dropped into their system from their lead vendor, Medicare Solutions. Their lead distribution efforts have become more efficient and AgencyBloc's software has **saved them up to 6 hours per week every Annual Election Period**. Automated Workflow has also allowed them to stay in more efficient and effective contact with their clients, prospects and leads, **saving them over 100 hours every renewal period** in sending renewal notices to their clients.

*"Our agency is more efficient, communications are more centralized, and lead distribution is trackable and quantifiable. AgencyBloc has truly automated our entire agency and has become our full-office agency management system."*



Client Quick Facts:



Milz Health Group:  
[www.milzhealthgroup.com](http://www.milzhealthgroup.com)



Specializes In:

- Medicare
- Med Supp
- ACA



# of agents: 8



Previously using:  
RadiusBob