



THE PROBLEM

After 18 years of using ACT, Morrison Insurance Services realized it was time to make the move to a new system as “ACT was no longer evolving with them”. In the beginning, ACT had been a fine fit for their simpler needs; however, as they grew, they had to take a “bandaid approach” to continue making it work for their needs. Morrison Insurance Services desired a system built for the health and benefits industry that required minimal customizations.

“AgencyBloc has delivered what they promised, they have been fair in the pricing, and they’ve been easy to work with.”

Jim M., Morrison Insurance Services

OUR SOLUTION

When Morrison Insurance Services first started looking for new technology, they noticed many agencies moving to one of two types of systems: an industry-specific system like AgencyBloc or some version of Salesforce. After looking at Salesforce and hearing from others in the industry using it, Morrison Insurance Services concluded that “most people use it because it’s a trend, but the amount of investment for customization was a common theme of frustration.” Additionally, they didn’t want to pay tens of thousands of dollars for a full-time consultant to help them reinvent the wheel. This led them back to AgencyBloc. The fact AgencyBloc is industry-specific and has a boot-strapped, client-funded model better aligned with who Morrison Insurance Services is. This was important to them because they have a similar model of investing in their clients and staying client-focused. Additionally, AgencyBloc’s vast knowledge and experience with data migration helped reassure them the transition of their 18 years’ worth of data would be smooth and successful.

THE RESULT

After one year with AgencyBloc, Morrison Insurance Services remarked: “AgencyBloc is making us better.” AgencyBloc gives their owner the ability to oversee his company on a macro-level to better understand where they’re thriving and where they need help. He relies heavily on activities and activity tracking to monitor his company’s performance and team’s productivity. Morrison Insurance Services has their employees set up in teams within AgencyBloc so assigned tasks go to a team of people to ensure every task is completed. One of their favorite features is the cloud-based capability. Having the advantage to work from anywhere and stay connected **saves them up to 30% of their time on internal communication**. The agents use this capability to reacquaint themselves with each client before they meet with them offsite to ensure they speak intelligently and their information is up-to-date. Beyond day-to-day usage, Morrison Insurance Services notes that they appreciate the time and care AgencyBloc puts into creating partnerships and launching enhancements to its platform.



Morrison Insurance Services is one of the largest privately owned agencies in San Diego, CA. They specialize in employee benefits for small to medium-sized groups with up to 2,000 employees.



Morrison Insurance Services:
misbenefits.com



of employees: 13
of agents: 3



Specialize in:

- Employee Benefits
- Ancillary Products
- Compliance



Previously using:
ACT