

# National Insurance Markets, Inc.

Learn more about how National Insurance Markets, Inc. uses AgencyBloc to centralize their data and save time during AEP.



## Specializes In

Employee Benefits, Annuities, Individual/Family Insurance, Life Insurance, Medicare

## Previously Used

Spreadsheets, GBS

## Employees

6

## Agents

200+

## Website

[nimbroker.com](http://nimbroker.com)

**95%**

time savings doing administrative tasks during AEP



National Insurance Markets, Inc. (NIM) is a full-service independent general agency (GA) in Pittsburgh, PA. Since 1979, NIM has partnered with licensed agents to provide Medicare, employee benefits, annuities, individual/family insurance, and life insurance to the greater Pennsylvania area. Today, NIM is in their third generation of ownership and is looking to the future for growth and opportunities.

## The Problem

NIM used a legacy agency management system, GBS, for many years that was antiquated and required an outdated Windows 95 computer to run. Due to a lack of access, slow technology, and an unsupported CRM, NIM was stunted in their ability to grow and expand their business. “The free version of GBS was fine, but it couldn’t foster the growth we wanted. **It didn’t allow us to fully track our data or capture data from our 200+ downline agencies in a streamlined fashion.** It only worked on one specific computer in the office, and it was pretty slow.” With a younger generation entering the business, NIM wanted to mature their technology, which included their CRM and entire IT infrastructure. Additionally, they sought a way to improve processes by connecting their different technology solutions and streamlining efforts for data management.

## Our Solution

NIM found the search for a new CRM to be a simple process overall. “We knew we’d have to go from paying nothing to paying something. **The goal wasn’t to find something for free; we wanted something that could support the future of our company.**” They had heard about AgencyBloc at various conferences and noticed that many attendees were Members of The Bloc (AgencyBloc clients). Overall, the biggest selling points for NIM were the ease of use, the

**“The way AgencyBloc has made our business easier to manage on the back end has been the main thing. Now, we can utilize a platform that is evolving alongside us, which is refreshing.”**

**Matt G.** | National Insurance Markets, Inc.

opportunity to add on a commissions processing tool (Commissions+), the integration opportunities, and the on-the-go access.

The big question for NIM was when to start. “Originally, we were going to wait until Q1 of 2024 when our IT migration was finished. We were in the middle of that migration and a few months away from the start of AEP. Then we asked ourselves, **‘What’s the point in waiting?’** We decided just to do it and figure it out for AEP.” **This meant that NIM was finishing onboarding with AgencyBloc as AEP 2024 was getting underway.**

## **The Result**

NIM became a Member of The Bloc in June 2023, shortly before the launch of AMS+, AgencyBloc’s expanded industry-specific agency management offering. “When AMS+ came out, the change didn’t affect us much because we were still pretty new. Instead, **it gave us access to even more features that we can now leverage for the future.**” NIM is starting to leverage the Automated Workflow functionality in AMS+ to increase client retention for their retail arm as well as stay connected with their many 1,099 agents in the field.

However, one of the most impactful features is the integrations in AMS+. **“The integration between AMS+ and ConnectureDRX is huge.** We process thousands of applications each AEP for our retail agency and all of our downline agents. We used to input all of that information manually. Now, it’s streamlined. **This integration will save us 95% of our time doing administrative tasks to support our agents during AEP!**” Pushing the data they need from Connecture into AMS+ helps them create a complete database of both their retail and downline agent management business, which is incomparable for NIM.

**AMS+ allows them to keep a central data repository that is trustworthy and accessible.** All in all, AMS+ gives National Insurance Markets, Inc. access to tools that can increase their competitive edge, improve processes, and better manage their growing downline agent business.