



THE PROBLEM

Northwest Farmer-Stockman Inc. needed a reliable system that could simplify internal communication and give their agents access to a CRM. Without a full company agency management system, NFS printed and sent paper copies of client documentation to their agents across the country for every new client, renewal, update, etc. This process could take up to a week each time. Once the agent received the information, it couldn't be guaranteed it was still up-to-date; thus, starting the process once again. Without a way to truly support their agents, their expenditures went up, and their business didn't grow as they hoped.

“AgencyBloc is the only CRM designed specifically for the health and life insurance industry, so it required very little customization. It's an intuitive system at a very reasonable cost with excellent and responsive customer service.”

Chris G., Northwest Farmer-Stockman Inc.

OUR SOLUTION

“We had been really old school for too long. We needed a change.” Northwest Farmer-Stockman Inc. needed a solution for their agents to manage their books of business remotely and be more self-sufficient. First, they considered a local CRM, which couldn't handle their needs, and then Salesforce, which required significant payments upfront in addition to an annual subscription. “We were to pay \$60,000 right off the bat for customizations and training, then nearly \$30,000 every following year.” NFS ultimately sought something designed for the insurance industry, saving them from needing to create extensive customizations. “AgencyBloc is designed for our industry; that's what sets it apart from other systems. It didn't cost extra for onboarding; customer service is fantastic—it was a no-brainer.”

THE RESULT

Over a year into using AgencyBloc, Northwest Farmer-Stockman Inc. is still discovering features that make their agency more efficient. “Our agents love AgencyBloc and the freedom it gives them.” Their agents can set up Automated Workflows like policy renewal, client birthday, and policy anniversary date reminders. With AgencyBloc, NFS has gained back **40 hours and over \$3,000 a month** in time spent taking agent calls, locating information, printing, and mailing documentation. This savings alone more than pays for their subscription. Now, NFS can go paperless as they've hoped to do for many years. “AgencyBloc gives us the peace of mind that our data is secure and private when we send tasks and information to our agents nationwide.” NFS's agent recruiting initiatives are expanding and improving since implementing AgencyBloc. “New agent reactions to AgencyBloc are very positive—I doubt we'd attract the same caliber of agents without the system.” This year alone, they're projecting a **30% growth in their agent base** and continued growth within their agents' books of business.



Northwest Farmer-Stockman Inc. (NFS), a division of Cowles Company, specializes in providing insurance and financial services to rural America since 1939.



Northwest Farmer-Stockman Inc.
www.northwestfarmer-stockman.com



of employees: 8
of agents: 24



Specialize in:

- Individual Health
- Life
- Annuities
- LTCI



Previously using:
Homegrown Solution