

THE PROBLEM

After expanding their agency to include life and health verticals, Pruitt Agency realized they needed an agency management system solely dedicated to this new business. For many years, they had relied on EZLynx for the P&C side, but it didn't offer them truly effective ways to manage, access, and document L&H information. "EZLynx didn't ask all of the demographic questions like Medicare information or policy numbers, and it made managing our agents really difficult. We had to dedicate one person to solely managing the system, and we had to spend a week each quarter traveling on-site to audit agents in each state." On the commissions side, Pruitt Agency relied on Excel spreadsheets, which were cumbersome and segmented data into two locations.

"If you're a reporting, OCD-type person, then this is the AMS for you. I haven't found any flaws. It's been very helpful for touching base with our clients, staying current with our data, and keeping us organized."

Tammy Hughes, Pruitt Agency

OUR SOLUTION

Pruitt Agency was recommended to AgencyBloc by another agency. "They really championed us to give AgencyBloc a try, and we're so happy they did. It's amazing." For Pruitt Agency, the biggest differentiator against other options considered was that AgencyBloc is built specifically for the life and health insurance industry. "The way you enter someone's information into AgencyBloc and track client data just makes sense for L&H." They especially liked how AgencyBloc is contact-based and broken down by the individual because it gives them more insight into the history and relationship. Having the Commission Module connected to AgencyBloc's CRM was a huge draw and gave them hopes for efficiencies throughout their agency.

THE RESULT


After one year with AgencyBloc, Pruitt Agency has seen incredible efficiencies in every department. "Processing commissions in AgencyBloc is so easy. Before, we'd go line-by-line on hundreds and hundreds of policies to compare and report. Now it's just three clicks, and we can run any report we want." They've been able to save over **75% of their time processing commissions**, going from a full two weeks every quarter to just one day. The time savings alone **amounts to nearly \$2,000 a month**. With AgencyBloc, Pruitt Agency can manage their agents remotely and appreciate the agent-specific Automated Workflows like upcoming license and E&O expiration reminders. Eliminating the on-site audits allows them to reallocate **40 hours and \$6,000 each quarter** to other revenue-generating projects. With all of the time-savings, Pruitt Agency has been able to focus more on selling and can confidently say that AgencyBloc has contributed to a **10% growth in sales** in last year. They are excited to see continued growth in the future.

PRUITT AGENCY


Pruitt Agency is a full-service insurance agency offering both P&C and L&H. Located in Mississippi, Arkansas, and Kentucky, they've positioned themselves to be the expert and offer assistance the moment someone walks through the door.

 Pruitt Agency
pruittagency.net

 # of agents: 25

 Specialize in:

- Life Insurance
- Health Insurance

 Previously using:
EZLynx, Excel