 AgencyBloc

Reliable Consulting Group

Discover how The Reliable Consulting Group used AgencyBloc to 5X policy saturation, drive 20% annual growth, recover 10% in missing commissions, and maintain 99% client retention — all while streamlining operations and scaling toward a General Agency.

Founded in 2018, The Reliable Consulting Group, LLC is an independently-owned insurance agency based in Northeast Ohio serving clients across the state and parts of Pennsylvania. The Reliable Consulting Group initially focused on group and worksite benefits before expanding into the Medicare and individual markets, which now make up the majority of the agency's business.

The Problem

"Managing our growing book of business in our previous CRM felt cumbersome. We needed a solution that could **track both group and individual business as well as commissions. We needed a change.**" From their inception, The Reliable Consulting Group used a combination of Excel spreadsheets and the NextAgency CRM to manage client, policy, and commission information. However, neither system fully supported tracking different entity types (individual and group), which required them to duplicate data and create time-consuming workarounds. They eventually resorted to only using spreadsheets to reduce confusion and ensure data integrity. **"Once I hit 100 in-force policies, I knew using spreadsheets was no longer an option.** I knew it wouldn't help me grow and that I needed a new solution."

Specializes In
Medicare, Individual Health, Group Benefits

Previously Used
Spreadsheets, NextAgency CRM

Agents
3

Employees
2

Website
rcgroupbenefits.com

99% client retention rate	**5X** growth in in-force policy saturation	**20%** year-over-year growth each year

Our Solution

"We heard about AgencyBloc's platform through industry connections at the National Association of Benefits and Insurance Professionals (NABIP) annual event. It came with the highest recommendation." After seeing a demo of AgencyBloc's solutions, The Reliable Consulting Group quickly hired their first admin to help oversee the project and manage the implementation. **"I was excited for an all-in-one solution that could keep the entirety of my business together,** rather than contracting with multiple solutions and siloing my data."

The Data Migration Process

The migration process from spreadsheets to AgencyBloc's platform was straightforward. The newly-hired admin bulk uploaded their existing spreadsheets of data and manually refined the information as they went. This process worked extremely well since The Reliable Consulting Group was early in their growth and had a smaller data footprint. **"Taking the time to migrate our data properly and clean it up gave us a strong base to fuel our expansion and focus on sales.** It was essential to have our admin team in place to support this process."

The Result

Since implementing AgencyBloc in 2021, The Reliable Consulting Group has transformed its operations and achieved measurable success. They've **grown their in-force policy saturation 5X, tripled their staff, and experienced 20% year-over-year growth each year.** Additionally, they have **maintained a 99% client retention rate** every year since joining The Bloc. The agency now operates with a high degree of organization and efficiency, enabling the team to focus on sales, client service, and strategic growth initiatives.

On the commissions processing side, The Reliable Consulting Group can now **accurately track and report on their incoming carrier and upline commissions, ensuring every cent is correct.** "AgencyBloc's Commissions+ solution is a must. A lot of agents trust the carriers to be right, but they aren't. **Whether you're a single agent or a growing agency, you have to have something in place to ensure you're being paid appropriately."** Using the Commission Not Received Report, the agency has **recovered over 10% of their total business value in missing compensation**.

With AgencyBloc's scalability, The Reliable Consulting Group is confidently moving toward becoming a General Agency, knowing the platform can support their needs and house their entire business lifecycle, from lead to renewal.