



## Saxon Financial Services, Inc. Case Study

*Saxon Financial Services, Inc. is a brokerage based in Cincinnati, Ohio that sells small group insurance, individual insurance, and Medicare throughout Ohio, Kentucky, Utah, and Washington. Recently, Saxon Financial Services, Inc. has focused their efforts on expanding into the large group market.*

### HOW DO YOU USE AGENCYBLOC?

AgencyBloc's industry-specific agency management system (AMS) is Saxon's database for client information and policy management. Saxon uses AgencyBloc daily to track data for new business, retention of group policies, and policy terminations.

In addition, Saxon manages all of their commissions in AgencyBloc's Commission Module. Using the Commission Module, they can easily scan for missed carrier payments. They also make use of the Sales Pipeline to proactively track their sales efforts from new leads to close.

Saxon relies on AgencyBloc's AMS to store all of their group and individual data, this central database sets up the medical underwriting process in FormFire easier by offering a centralized location for personal data. Lastly, they use the sales-specific tools to manage their sales pipelines they make use of AgencyBloc's Activities to help their team stay on task throughout the entire process.

### HOW HAS AGENCYBLOC BEEN OF VALUE TO YOU?

Saxon finds AgencyBloc's Automated Workflow tool invaluable. They love that AgencyBloc makes communication simple and reliable. Using Automated Workflow, Saxon has reduced the amount of time they spend writing and sending prospect and client communications, **increasing their productivity by 40%**.

Saxon has **experienced a 22% YOY growth in their book of business** and attributes a large part of that to AgencyBloc's automation and task management tools. On the commissions side, using AgencyBloc's Commission Module has made their processes more efficient. Saxon **spends 60% less time processing commissions** and is now able to pinpoint missing commissions from carriers. "With AgencyBloc, we feel more secure that our commissions aren't forgotten quarter after quarter."

### HOW DO YOU USE FORMFIRE?

Saxon uses FormFire to manage their small group quoting, proposal, and enrollment processes during Open Enrollment. Like many other FormFire users, Saxon was drawn to the system because of the Southern Ohio Chamber Alliance, a Multiple Employer Welfare Arrangement (MEWA) administered by Anthem, and the Council of

**"We love the automation features for communication in AgencyBloc. It's nice not to have to send the same emails over and over again."**

—Matthew Bosse, Senior Account Analyst



Small Enterprises (COSE) MEWA administered by Medical Mutual.

After they have entered client data and tasks into AgencyBloc, Saxon moves to FormFire to complete underwriting and move the policy through their pipeline. They run the majority of their business through FormFire to streamline their enrollment season.

### HOW HAS FORMFIRE BEEN OF VALUE TO YOU?

Saxon values that, by using FormFire, the carrier forms are pre-populated, censuses are easy to gather, and quoting is streamlined. Since adopting FormFire, Saxon has **grown quoting by 32%**, which allows them to provide more value to their prospects and clients.

### SAXON TODAY

Using both FormFire and AgencyBloc provides Saxon Financial Services, Inc. with the ability to efficiently and effectively serve their clients. Utilizing AgencyBloc, Saxon has access to a centralized database, task-tracking tools for employees, sales pipeline management, and automation features that allow them to easily communicate with clients. Pairing AgencyBloc with FormFire allows Saxon to expedite the medical underwriting process, saving the agency significant time during enrollment season.

**“The return on investment opportunity with FormFire is there if you use it to its full potential.”**

—Matthew Bosse, Senior Account Analyst

The best way to see how AgencyBloc or FormFire could benefit your agency is to [request a personalized demo](#).

