

Stevens & Associates

Stevens and Associates has been a Member of The Bloc since 2018. They've partnered with AgencyBloc to **achieve substantial 25% year-over-year growth** and have introduced efficiencies across many processes — including commissions, client retention, and new business management. This case study details their experience of leaving their legacy platform, choosing to partner with AgencyBloc, and finding success with AgencyBloc solutions.



Stevens & Associates
Insurance Agency, Inc.

Specializes In
Individual Insurance,
Medicare

**Previously Used/
Considered**
Spreadsheets

Employees
24

Agents
7

Website
stevensinsurance.com

Established in 1984, Stevens and Associates is a family-owned independent agency located in Santa Barbara, California. Originally, they started in the individual insurance business as their primary focus, but by applying Midwestern values — honesty, integrity, and hard work — they have grown to serve a wide range of needs in the health insurance and HR industries. They have focused on growing their Medicare book of business specifically and now support Medicare sales and clients in all 50 states.

The Problem

Stevens and Associates has used a variety of tools as their CRM over the years. They originally relied on spreadsheets and were early adopters of GBS, a pioneer in on-premise CRM solutions. In 2017, AgencyBloc acquired GBS and began a multi-year sunseting process, which required Stevens and Associates to consider other options.

211%
business growth
since becoming a
Member of The Bloc

\$100,000
in missed commission
payments uncovered
as of 2025

97%
retention rate
for Medicare
clients



“AgencyBloc has been incredibly successful in building a picture-perfect ecosystem for the most effective health insurance agent. From data management to commission management, this system has been a solid foundation for our entire team.”

Jason S. | Stevens & Associates

To guide them through the process, they made a list of must-haves with a new solution:

- **Versatility:** They needed a tool that would evolve with their business.
- **Organization:** They wanted to ensure all team members would have access to the files they needed to best support clients at any point.
- **Commissions:** They wanted a built-in commissions management tool that connected to their client data.
- **Structure:** Their biggest requirement was to find an industry-specific tool that provided the structure to support their business growth.

Another functionality they were curious about was cloud-based software. “One intriguing option at the time was the idea of cloud-based software. It was still a newer concept in 2018 so as you can imagine, we were very worried about that kind of shift. We didn’t have that with GBS, but we could see the potential for our agency’s future and the reward far outweighed the risk.”

Our Solution

“We dedicated ourselves to researching the options available and finding the best fit for our team. We didn’t know how to make the transition, so we needed a true technology partner that would support us from day one.” Stevens and Associates knew one of the biggest changes they’d experience would be going from paying nothing for a tool (both spreadsheets and GBS) to paying a regular subscription fee.

During the process, they evaluated nearly every AMS and CRM available at the time. “Most of the solutions we looked at were focused on being simple, which is great. However, **we found them to be too simple.** AgencyBloc was the perfect blend. **It was simple enough to use but offered customization so we could make it our own.**” The team also found that many tools didn’t offer built-in commissions management, which was a critical function for their needs. AgencyBloc offered insurance-specific features plus built-in commissions processing that checked all their boxes.

The Result

“We were afraid to move at first. But we didn’t really understand what we were missing out on. **Moving to AgencyBloc was one of the most valuable advancements our agency has experienced.** Some say the grass is greener on the other side. **In this case, it was layered with gold.**” Stevens and Associates became a Member of The Bloc in early 2018.

In the 8 years since, they have been able to achieve some big wins:

- Completed a much-needed data overhaul and update project
- Brought all of their data into one central AMS — client data and commissions
- Created consistent processes throughout their organization
- Leveraged integrations and workflow automation
- Supported a **211% business growth** — a 25% year-over-year average since 2018

Stevens and Associates Top 3 Tools in AMS+

Stevens and Associates relies heavily on AgencyBloc's Commissions+ solution. Commissions+ has enabled Stevens and Associates' team to establish a consistent process for tracking, managing, and reconciling commission payments. This process has given them the freedom to grow their business without the need to expand headcount, as they've been able to rely on one person to run their entire commissions department since 2018. Some of their biggest wins with Commissions+ include:

- Using the automated upload and mapping features to streamline the process and **reduce the time they spend managing commissions by over 50%**
- Tracking all their payment hierarchies and types in one place to **restore trust in their commission data**
- Using the Commission Not Received Report to identify missing payments from carriers — this report alone has helped **uncover over \$100,000 in missing payments as of 2025**, and are on track to **reclaim more in 2026**

Another area in which Stevens and Associates has found significant benefit is the Automated Workflow functionality within AMS+. The team is highly focused on creating efficiencies and working smarter, not harder. They've used workflows to create more consistent processes across their agency to maintain client experience and reduce manual effort. Some of their biggest wins with Automated Workflows include:

- Tracking all policy submissions with workflows to keep the process on track. **This process helps them act faster to changes in the policy and ensure it posts properly.**
- Sending out thank-yous and follow-ups to all new business contacts, a process they did manually in the past. By automating this sequence, their team **saves 40 hours of employee time per month, resulting in \$9,000+ saved annually.**
- Using a turning-65 workflow (T65) to support the growth in their Medicare business, which has helped them **achieve a 97% retention rate for Medicare clients.**

A more recent development for Stevens and Associates is their use of integrations with AgencyBloc's Open API. They rely heavily on custom fields and IDs in AMS+ to connect them with Keragon and Zapier.





The two stand-out integrations they've built are:

1. **Client Servicing:** Leveraging client IDs in AMS+, the team auto-populates forms to streamline client servicing. The main focus is to reduce time spent supporting clients via phone calls and emails, while also increasing retention. Using this integration, their admins, agents, and customer service reps have **saved 385 hours in the last year, resulting in over \$10,000 in employee time.**
2. **Lead Capture:** This integration both creates new contacts and updates existing ones by leveraging client IDs in AMS+. The goal of this integration is to maintain accountability and ensure the team gathers all the necessary data the first time, thereby reducing the need for manual follow-ups. Since implementation, the form has **saved team members 10-12 minutes per new business call, saving a combined 600+ hours during the busy season alone.**

The extra benefit of these integrations is that they're two-way. This means all of the data collected on the forms automatically populates in AMS+, ensuring that Stevens and Associates' data in AMS+ is complete.

What's Next

Stevens and Associates has achieved a lot of exciting growth over the last 8 years as a Member of The Bloc. But they're not ready to stop yet. Looking ahead, they're currently investigating AgencyBloc's latest solution, Engage+, for digital marketing support.