

Sun Coast Legacy Advisors

See how Sun Coast Legacy Advisors uses AgencyBloc's AMS+ and Commissions+ solutions to cut \$80K in costs, grow 15% year-over-year, boost referrals, and scale statewide.



Specializes In
Medicare

Previously Used
Salesforce

Agents
8

Employees
11

Website
suncoastlegacyadvisors.com

Sun Coast Legacy Advisors is a locally-owned senior insurance agency. They've served the Northeast Florida Medicare market since 2010, offering all Medicare-based health insurance plans. Using traditional marketing methods and sending turning-65 magazines, Sun Coast Legacy Advisors has expanded to serve the entire state of Florida, with plans to grow further.

The Problem

Sun Coast Legacy Advisors was an early adopter of CRM technology. In 2012, they moved their agency from spreadsheets to a custom-built version of Salesforce. "Our whole Salesforce instance was incredibly custom. We had our own 'Salesforce Wizard' engineer on retainer (\$1,500 a month) and managed the entire project ourselves. The system cost us nearly \$80,000 a year to maintain." However, in the post-COVID era and with changing compliance regulations, the management of the custom Salesforce system became more time-consuming. "Every add-on cost money. We needed a commissions processing tool and knew that more compliance regulations were on the horizon. Plus, our business was experiencing significant growth. Simply put, we didn't want to make it work anymore."

15%

year-over-year
growth in their
book of business

900%

increase
number of
Google reviews

7,000

emails sent
every month
to clients

“AgencyBloc is an integrated management system that allows you to grow and scale your business and effectively manage and maintain your business.”

Bill G. | Sun Coast Legacy Advisors

Our Solution

“We found AgencyBloc at the 2024 Medicarians show, and it just made sense. We asked some of the other respected agents in the field, and they all used AgencyBloc’s solutions. We didn’t need to shop around.” Sun Coast Legacy Advisors chose AgencyBloc’s platform because it offers an all-in-one agency management system (AMS+) that’s designed for the health insurance industry. They were most excited about the built-in commissions processing solution, Commissions+, and the compliance features that made their lives easier to manage. “It was an easy answer. AgencyBloc’s platform had everything we needed.”

The Result

“AgencyBloc’s solutions are scalable, user-friendly, and easier to implement for new employees. Plus, they have a great training program and support.” In their first year with AgencyBloc’s solutions, Sun Coast Legacy Advisors has **seen a 15% year-over-year growth in their book of business**. Every sales rep and admin employee at Sun Coast Legacy Advisors use the AMS+ solution daily to manage tasks, clients, sales, and communications. The owner uses the Dashboards to get a bird’s-eye view of policy saturation, coverage type breakdown, carrier mix, and year-over-year differences.

Sun Coast Legacy Advisors leverages the communications tools in AMS+ (Automated Workflows, email marketing, and text messaging) extensively throughout their agency. They ran a Google reviews campaign that helped them **go from 50 reviews to nearly 500 in just a few months**. “We use AMS+ to **send over 7,000 emails every month to our clients**. Our client retention rate has always been over 95%, but AMS+ helps us communicate regularly, which is helping us protect that number as we grow. We’ve also seen our **referrals increase 10% over last year**, which we can attribute to our automated communication efforts.”

Sun Coast Legacy Advisors’ team has been an active participant in providing feedback to the AgencyBloc Product Team. They have participated in recent beta testing opportunities for AMS+’s Rx Collect feature and the integration with Sunfire. “I’m excited to see where AgencyBloc goes next, especially with Rx Collect because it retains data from one year to the next. That’s huge. The Sunfire integration will also be great because it will significantly reduce the manual entry for our enrollment and renewal processes.”

Looking forward, Sun Coast Legacy Advisors plans to learn and adopt more functionality in AMS+, continue providing feedback to help improve The Bloc, and, hopefully, double their staff size in the next year.