

Lewer Companies

See how the Lewer Companies brought their operations into one platform with AgencyBloc — streamlining workflows, improving data visibility, cutting auditing time by 40%, and delaying the need for new hires while scaling confidently into the future.

**Specializes In**

Employee Benefits,
International Student
Insurance

Previously Used

Salesforce, Microsoft
Dynamics

Agents

15

Employees

45

Website

lewer.com

40%

reduction in time
spent auditing and
managing records

Founded in 1956, the Lewer Companies is a multifaceted organization that provides insurance to businesses and higher education institutions across the United States and Canada. Now in its third generation, Lewer has several brands, including, LewerBenefits, LewerMark, Lewerglobal, and Ingle Lewer, all of which are dedicated to protecting people around the world.

The Problem

Before implementing AgencyBloc, Lewer relied on a combination of Salesforce and Microsoft Dynamics to manage operations. Using multiple systems created disparate workflows and increased reliance on manual processes for sales, retention, and internal communication. Additionally, they lacked a centralized platform to track all their data, which affected their ability to analyze their business and make informed decisions. “Reporting was cumbersome. We had limited data visibility. It was hard to pull insights, track retention, or monitor group performance with data in multiple systems.” As the agency expanded its operations, the need for a centralized, streamlined system that could improve transparency, automation, and communication across departments became critical.

Our Solution

The Lewer Companies found AgencyBloc through a new hire who was familiar with the platform. They appreciate how AgencyBloc connects their data and provides more in-depth reporting for their operations team. “AgencyBloc provided us with the opportunity to put all of our data together and improve internal communication. It was a win on all accounts.” With the certainty of their hire’s previous experience, they knew they could make AgencyBloc their centralized database from which their full-service agency could continue to expand.



“AgencyBloc’s platform has increased our business’s efficiency and helps me sleep better at night. The workflows have transformed our processes and procedures. It’s helped us streamline and spend more time focusing on our clients while staying organized and on task.”

Carrie H. | Lower Companies

The Result

Since becoming a Member of The Bloc in 2024, the Lower Companies has seen measurable improvements in workflow efficiencies, internal communication, data accuracy and access, and analysis capabilities. “Our business is growing. Typically, we would’ve had to hire an additional 1-2 full-time employees by now. However, AgencyBloc has helped us delay that need by 18 months. **We can do more with our existing team, and the need for new positions has shifted to fit our efficient processes today.**”

The team at the Lower Companies loves Automated Workflows and Activities in AMS+ and has successfully **built multiple customized workflows that automate their processes across departments.** What once required spreadsheets, manual updates, and back-and-forth communication is now housed within a single, centralized platform. Managers can easily monitor tasks and audit workflows across teams, departments can more intuitively work together, and the agency can be confident tasks aren’t getting lost. **“Now, multiple teams can access the data they need without manual workarounds or bottlenecks.”**

Their operations team can access all of the data they need to audit successfully. Using AMS+, they have **reduced their time spent auditing and managing records by 40%.** From Dashboards to Custom Fields to Custom Reports, the operations team has the tools in place to track their growing business and gain critical visibility into key performance metrics, such as in-force policies, revenue tracking, new vs. lost business, and client segment saturation.

With the next renewal season approaching and plans for expansion underway, the Lower Companies is fully equipped to scale confidently, knowing that AgencyBloc’s platform is there to support them every step of the way.