



AgencyBloc Case Study

Learn how The Shields Agency leverages AgencyBloc's tools like Sales Pipeline, Automated Workflow, and the Commission Module to save time and grow their business.

THE PROBLEM

From its inception, The Shields Agency knew that having a CRM with commissions processing was essential for a thriving business model. During their search, The Shields Agency investigated many vendors, including AgencyBloc, but chose to partner with another, NextAgency, due to price and the expectation that their platform would expand. "NextAgency's basic CRM worked fine, but we needed more, and the commissions system was still in Beta. The system wasn't functional for our needs and our growth, but the biggest factor was commissions." The Shields Agency spent **\$30,000 over the course of a year** building out their processes in NextAgency, but ultimately decided it wasn't working for their needs. Additionally, they ran spreadsheets in parallel during this year, which made their data messier and less reliable.

OUR SOLUTION

When The Shields Agency started their search once more, they went back to the beginning—back to AgencyBloc. "AgencyBloc had originally been referred to us by our GA. We went through the training videos and testimonials on YouTube, which

ABOUT

The Shields Agency is a Texas-based boutique agency specializing in individual insurance, small business benefits, Medicare, and life insurance. They offer traditional and non-traditional options to find the best fit for their clients.

WEBSITE

theshieldsagency.com

AGENTS

4

EMPLOYEES

4

SPECIALIZES IN

Individual Insurance, Small Business Benefits, Medicare, Life Insurance

PREVIOUSLY USED

NextAgency



90%

reduced time importing commission statements



25%

YOY business growth



10%

of bottom line recovered in missing commissions



really made the decision for us.” The key functionalities they desired in their new agency management system included commissions processing, reporting, dedicated support and customer service teams, and continuous enhancements. “We wanted to partner with a vendor that makes updates to its system and launches enhancements regularly. Our previous solution didn’t do that during our time with them.”

THE RESULT

“**The onboarding process with AgencyBloc was amazing!** We had a dedicated team and the resources we needed to be successful. We didn’t have this experience with our previous solution.” AgencyBloc’s Commission Module, one of the crucial selling points for them, has helped them be significantly more efficient and trust in their commission data. “We’ve recovered **10% of our bottom line in missing commissions, reduced our time importing commission statements by 90%**, and we know that **2022 will be a solid year.**” Another critical benefit for The Shields Agency has been improved data integrity. “Before AgencyBloc, our data was a mess from spreadsheets and exporting data segments from NextAgency. Our data in AgencyBloc is data we can function with and use to make our business better.” They have begun using AgencyBloc’s Sales Pipeline to gain more insight into their sales and growth opportunities. They use Automated Workflow to streamline renewal processes and turning 65 notifications. They also find AgencyBloc’s reporting simple and easy to use. “We’ve **grown our business by 25% YOY** using AgencyBloc. Businesses lose 20% annually through missed renewal opportunities and missed commissions, but with AgencyBloc, **that doesn’t happen to us. Without AgencyBloc, we’d absolutely melt.**” Next, The Shields Agency is excited to start tracking the profitability of their leads sources and revenue types to see where they’re spending money, where they’re making money, and how they’re paying their team.

“AgencyBloc has allowed us to develop as a boutique agency by providing the tools that larger corporations have at a price that’s accessible to us as a small agency. It’s created efficiencies and helped us grow our revenue due to proper data tracking.”

—Leslie S., The Shields Agency

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