

Business Process Management for Insurance and Benefits Agencies: Simplified

3 Common Internal Process Issues Businesses Have:

- 1 Poor time management
- 2 Disorganization and inefficiencies
- 3 Ineffective communication

All of these issues have a ripple effect across your agency that impacts:

Client satisfaction and retention & Employee satisfaction and retention





The Solution?

BUSINESS PROCESS MANAGEMENT

Businesses that implemented business process management (BPM) tactics found a

70% improvement in the success rate of their projects.¹

Optimal Business Process Management Can:

-  Save time, energy, and resources
-  Improve client satisfaction
-  Enhance team productivity
-  Boost employee success and retention rates

Which leads to agency growth and increased revenue.

Workflows are defined as a sequence of actions that happens after a specific event occurs. Workflow automation happens when a series of tasks are automatically created after said event, eliminating manual tasks and bringing efficiency into your BPM.

Recurring administrative tasks consume two entire work days every week.²

Work Smarter, Not Harder

Take this valuable time back and streamline business processes with automated workflows.

Automated Workflows + BPM = Business Process Automation

Business process automation occurs when you use technology to automate recurring daily tasks. It expedites how work gets accomplished by getting the right information to the right person at the right time through user-specified actions and criteria.

Elevate Your BPM With AgencyBloc's Industry Specific Software

AgencyBloc makes it easy to integrate your BPM with automated workflows

-  **STEP 1**
Identify your main goals and critical touchpoints that your team needs to take advantage of.
-  **STEP 2**
Use AgencyBloc's automated workflow builder, which is designed specifically for insurance and benefits agencies.
 - Name the workflow
 - Set up trigger-based actions
 - Choose a timeframe
 - Select the criteria
 - Specify the task you want the workflow to generate
 - Take action
-  **STEP 3**
Set your workflow to live.

ACTIONS CAN SHOW UP AS:



Tasks: A prospect submits a lead form. They are automatically assigned to the appropriate agent, and a high-priority task is created for that agent to follow up immediately.










Emails: A client's policy is up for renewal, and an automated email is set to trigger at set times prior to the renewal date to remind them to start the process.



Reminders: Your agent's license needs to be renewed. Your agency management system (AMS) sends out reminders on specific dates to ensure they don't forget.

In AgencyBloc, You Can Create Workflows For:

-  Lead Nurturing
-  Lead Form Submissions
-  Client or Agent Onboarding
-  Client Relationship Building (Birthday and Anniversary)
-  Upcoming Policy Renewals
-  Submitted Policy Applications
-  Agent License and E&O Renewals

You can set custom automated workflows or choose from our selection of pre-built workflows. Either way, you will end up saving extremely valuable time, energy, and resources.