

Case Study | ABC Insurance Services, Inc.

About The Company

ABC Insurance Services focuses on providing group insurance products and services to members and their employees. Products include Life, Health Disability, Dental, Vision, Critical Illness and 401(k) options for employers. The agency was founded in 1997 to provide a market-based approach for health care to Associated Builders and Contractor members.

The Problem

Beginning in 2000, ABC Insurance Services utilized a homegrown contact management system developed by an outside vendor and designed for the unique needs of the organization. This CRM system was an evolving platform. In 2012, the CRM system was scheduled for a rewrite and updating of the system. This process spanned two years and progressed very slowly due to time constraints and lack of capacity by the vendor. After almost two years of agonizing development, a decision was made to change.

Our Solution

ABC Insurance Services had previously looked at AgencyBloc as far back as 2011. The rewrite of their homegrown CRM system seemed like the best alternative at that point, so further investigation was put on hold. Then in late 2014, the decision was made to find a change. AgencyBloc was the first system that ABC Insurance Services looked at, and it became obvious after the first demo that AgencyBloc had made significant enhancements and offered the components ABC sought in a new CRM.

The Result

ABC Insurance Services continued to utilize their old system and ran AgencyBloc on a parallel basis. Their main concern was in the area of commission tracking to make sure the systems lined up for control and auditing purposes. After two months of tracking, ABC switched over to AgencyBloc completely.

With a large database including not only clients but also over 20,000 prospects, there was a lot of data cleanup needed before moving to a new system. AgencyBloc staff was able to use their expertise to help make the data migration process smooth and effective for ABC's unique needs.

“The AgencyBloc system is a much more user-friendly, easy-to-navigate system for our agents, account managers, and office staff.”



Client Quick Facts:



ABC Insurance Services:
www.meritchoice.org



MERITCHOICE®
Insurance and benefits.
Exclusively for ABC members.



Specializes In:

- group life & health
- group disability
- group dental & vision
- 401(k) options



Number of employees: 14



Previously using:
Homegrown system