

## Case Study | Brystra Insurance Services

### About The Company

We spoke with David Bryant of Brystra Insurance Services. Brystra is located in Los Angeles, California and specializes in group and voluntary benefits. The company mainly focuses on Health, Life, Disability, Dental, Vision, HSA/FSA, Advanced Flex, Section 125, Premium Only Plans, and Key Employee Plans.

### The Problem

Brystra wanted to be able to present themselves in a professional manner to their contracted agents and other partners, combine both their CRM and commissions processing, provide access for their agents to see their individual books-of-business and commission statements, and needed a system with a support staff that would be easy to work with and contact. Brystra also sought a system that could grow with them. Originally, they were using Salesforce for finance with a velocity plug-in (CRM) but it wasn't scalable for them due to cost for each user. They tried Zoho, but it wasn't the right fit. They seriously considered Gen4, but Brystra felt that the service was unfriendly and the system was visually out-of-date. They experimented with Vertafore, but experienced the same problem with cost per user as Salesforce in that they couldn't control costs by allowing only partial access (commissions or agent-CRM) to certain users at a lower price point. In addition, they found the appearance to be visually overwhelming and thought it would require too much training for their agents as they quickly grew.

### Our Solution

AgencyBloc's easy-to-use software, tiered agent pricing system, and tracking capabilities were a must-have as Brystra continually hires new agents. The ability to combine both their CRM

and commission processing into one platform was invaluable, and the individual support from AgencyBloc's Client Success Team made the transition and onboarding easy. Everyone at Brystra Insurance Services always felt like AgencyBloc made time for them.

### The Result

After one year with AgencyBloc, Brystra is able to present themselves at the professional level they need to their partners and contracted agents. One of the greatest advantages they have found with AgencyBloc is their ability to be transparent, not only with their partners and clients but also with their employees by having all of their information in one centralized location. They can provide detailed commission overviews for their agents and partners, as well as renewal reminders to their agents for E&O and licensing. Brystra finds that one of the best features of AgencyBloc is their individual attention to their clients and their desire to be always improving their system.

*"AgencyBloc has been helpful, positive, and responsive in helping us address our needs from onboarding to ongoing."*



Client Quick Facts:



**Brystra Insurance Services:**  
www.brystra.com



**Specializes In:**

- Group Life & Health
- Group Disability
- Group Vision & Dental
- Voluntary Programs



**# of employees:** 10  
**# of agents:** 100+



**Previously using:**  
SalesForce, Zoho & Gen4