

## Case Study | Davenport & Associates

### About The Company

Davenport & Associates Insurance is a family-owned agency based in McAllen, Texas. Founded in 1992, they provide group benefits and benefits consulting to Southern Texas.

### The Problem

Without commissions processing available in their on-premise version of Advisor's Assistant, their commissions processing was done manually via Excel spreadsheets. They would pour through paper statements from each carrier line-by-line, then manually split them out and type them into a separate spreadsheet. This led to a multitude of errors including paying out commissions they hadn't yet received. Outside of commissions, they found the reporting to be so difficult, they never used it. Additionally, the system didn't allow differentiation between "group" or "individual", and tracking all lines of business together caused confusion.

### Our Solution

The greatest draw to AgencyBloc for their agency was the commissions processing. Managing their commissions in the same system as the rest of their book of business makes their operations simpler and more accurate. Additionally, uploading statements from their carrier directly into the system saves them time. Since AgencyBloc is cloud-based they can work away from the office and access their information during client meetings. Overall, they've found that AgencyBloc's updated interface and layout just "makes sense."

### The Result

AgencyBloc's commissions processing is a huge time-saver for Davenport & Associates. Regarding the initial commissions setup in AgencyBloc, they remarked, "Once it's done, it's done!". For their largest carrier alone, they've **saved 50% of their time processing commissions**. They have found reports in AgencyBloc to be intuitive and simple. They're making use of automation to track renewals by setting workflows that notify them 120 days out from expiration. This lets them know it's time to get in touch with the particular client. Overall, they've found AgencyBloc to be very user-friendly and they're excited to expand their knowledge and use of AgencyBloc throughout their agency.

*"The system is very user-friendly, easy to navigate through, and easy to do our commissions processing. There is a lot of software where you go 'oh my god', but I think the layout of the whole system is really great."*



Client Quick Facts:



Davenport & Associates:  
[www.davenportins.com](http://www.davenportins.com)



Specializes In:

- Life
- Health
- Employee Benefits
- Ancillary Products



# of employees: 3  
# of agents: 6



Previously using:  
Advisor's Assistant