

Case Study | D&S Agency

About The Company

A partner firm of United Benefit Advisors (UBA), D&S Agency is an independently owned employee benefit consulting firm representing corporate clients headquartered in Virginia, North Carolina, and West Virginia.

The Problem

Initially, D&S Agency managed their commissions via Commission Tracker. However, they found it to be “antiquated” and time-consuming when it came to tracking their commissions. They would have to manually enter each individual commission statement (some being 13+ pages) into the system line-by-line which would take upwards of 4 hours of uninterrupted time. This caused their reports to occasionally include frustrating errors. Additionally, they found the reports to be unmanageable as they couldn’t refine and edit the report parameters and were left printing off 100+ pages for 10 pages-worth of data. In short, they needed something more robust.

Our Solution

D&S Agency first heard of AgencyBloc through its integration with Employee Navigator, an all-in-one employee benefits, HR, and compliance platform. After additional research, they found the combination of AgencyBloc’s powerful commission platform and the tight integration between the platforms to be exactly what they needed. With AgencyBloc, D&S Agency can manage their commissions and contacts seamlessly across both AgencyBloc’s and Employee Navigator’s systems. They also found the policy and contact tracking capabilities to be very beneficial because they could break down their commissions into individual contracts and more effectively track them.

The Result

A year later, D&S Agency can now track and manage their commissions like never before. With the carrier statement import, they’ve been able to drastically reduce errors and typos saving them many hours and headaches. On manual entry alone, they have **gained back 250 hours every year resulting in a savings of \$4,000**. They have found such significant savings with AgencyBloc, **they’ve been able to reinvest \$30,000** normally used to manage commissions into other areas of their agency. They have also seriously minimized their printing costs with AgencyBloc’s customizable and previewable reports. Another perk they didn’t know they needed was the cloud-based capabilities allowing them to work from anywhere at any time. Plus, with a cloud-based system, system updates happen automatically, so they are always working off the most up-to-date data. Looking to the future, they’re excited to expand the data they’re tracking to better monitor their individual and group policies—a capability that wasn’t available with their previous systems.

“The biggest thing for us is the time savings, especially concerning manual entry—that’s the most beneficial thing we’ve found as an agency.”



Client Quick Facts:



D&S Agency:
www.dsagency.com



Specializes In:

- Employee Benefits
- Consulting
- Health Insurance
- Retirement
- LTCI



of employees: 11
of agents: 8



Previously using:
Commission Tracker
& Quickbooks