

Case Study | Foy Benefits

About The Company

Located in Watertown, New York, Foy Benefits manages both in-house and outside brokers. They deal mainly in group medical plans and benefits.

The Problem

Foy Benefits was using Gen4, but found it to be “clunky and cumbersome”, citing slow page loading and multiple clicks to create, search, or update records. Their main problem, however, was its lack of integration with Employee Navigator, which meant holding several ongoing meetings to discuss which system would house what information so there would be continuity. They also held meetings covering how to complete tasks in Gen4, attempting to achieve uniformity across all teams. The other major frustration they faced was with commissions. Every pay period, Foy Benefits had to re-enter each carrier statement into the system since Gen4’s import and the carrier’s format didn’t match. All in all, they felt Gen4 was “trying to do too much”, yet still not meeting their basic needs.

Our Solution

Foy Benefits discovered AgencyBloc through the annual Employee Navigator conference in 2017. They sought a user-friendly, updated system that had a fluid integration with Employee Navigator and could help them manage and process their commissions. AgencyBloc fulfilled those needs. An added bonus they now enjoy is the customizable Lead Form builder they use for lead generation on their website—which was not an option in their previous system. The carrier tab has given them the ability to house all of their logins and passwords for each individual carrier in one, easily accessible place, so their team can work more efficiently.

They use Dashboard Analytics and Personal Dashboards in their meetings to help them illustrate the different trends in their agency and better understand how to move forward.

The Result

After almost a year with AgencyBloc, Foy Benefits is running strong and growing. AgencyBloc has an average one second page load time, allowing them to get work done quicker and stay on task. In employee time alone, they **save \$6,000 annually**, creating a positive ROI, even without the additional cost savings or reclaimed commissions. Their **time processing commissions has been cut by 66%**, and with a more streamlined Carrier Statement Import, Foy Benefits has **gone from 8 hours per month spent on imports to only 2 hours**. One of their favorite features is the zip code radius search which they use to pinpoint prospects in any given area when they’re out and about doing door-to-door or client visits. They’re able to stay in better communication with their clients and agents by utilizing Automated Workflows to send happy birthday emails, reminders for E&O and licensure expirations, and notifications about terminated clients. The main bonus Foy Benefits found this past year has been the time savings and productivity increases, making it possible to get considerably more done in less time.

AgencyBloc is very modern, quick, and just administratively simple.



Client Quick Facts:



Foy Benefits:
www.foybenefits.com



Specializes In:

- Health Insurance
- Ancillary Benefits
- Life Insurance
- Disability Insurance



of employees: 6
of agents: 10



Previously using:
Gen4