

## Case Study | Health Insurance Store

### About The Company

The Health Insurance Store is an FMO located in Kissimmee, Florida. For over two decades, their 1,000+ agents have been serving the 65+ market selling Medicare, ACA, and life insurance.

### The Problem

The biggest pain point they experienced with GBS was with the reports. The reports were difficult to create and the end result wasn't very helpful. With nearly every person running at least one report on a daily basis, this was a serious concern. Other frustrations included their lack of ability to reconcile their commissions, track and manage agent and employee productivity, and internal communication like task assignments and document accessibility through the platform was a struggle. If an agent called in with a question, they'd be transferred from department to department until they found the person with an answer.

### Our Solution

Impressed by how helpful and responsive AgencyBloc was during the sales process (and later with Client Success), the Health Insurance Store decided it was the right solution. They found having a dedicated AgencyBloc Client Success Specialist was a huge plus. They like that AgencyBloc always helps them find a way to meet and fix their "impossible problems". As their offices are located in two separate buildings, communication is key for a productive workday. The combined powers of the Dashboard Analytics, Automated Workflows, and the Activities features have significantly improved internal coordination and made their day-to-day easier. Being an FMO, agent tracking is crucial, and the ability to track and manage their agents has improved accountability and productivity.

### The Result

After a year with AgencyBloc, the Health Insurance Store has seen large savings in multiple departments. On the reporting side, Custom Reporting allows them to quickly pull insightful reports for any role. They've been able to **save 1,000 hours in creating and generating reports resulting in nearly \$30,000 of savings every year.** Commissions have been significantly simplified, and their time processing commissions has been **cut by 75%**. By utilizing the Commissions Not Received report, the Health Insurance Store was able to, for the first time ever, file a missing commission claim to all of their carriers. They especially appreciate the automated birthday emails and the ability to track all client and prospect correspondence directly in AgencyBloc. By enhancing client communication, they've been able to **retain 90% of their business in the year since moving to AgencyBloc.** They've seen other gains with growth in their book of business, increased productivity, fewer manual entry errors, and the quick access to documentation. Overall, the Health Insurance Store has found a huge improvement in their day-to-day with the help of AgencyBloc.

*"What we've accomplished in one year with AgencyBloc far exceeds what we accomplished all those years with GBS. It's the best software decision this company has ever made."*



Client Quick Facts:



Health Insurance Store:  
[www.4insurancestore.com](http://www.4insurancestore.com)



Specializes In:

- Independent Agent Services (FMO)
- Medicare
- ACA



# of employees: 35  
# of agents: 1,000+



Previously using:  
GBS