

## Case Study | Insurance Marketing Group/Senior Security Benefits

### About The Company

Insurance Marketing Group/Senior Security Benefits (IMG/SSB) is an IMO/FMO located in Fort Worth, Texas. Beginning in 2003, it was solely a health insurance marketing firm, but it grew to include a telemarketing center as well. It has contracted over 7000 agents to sell out in the field and also has 8 in-house agents which it provides leads to.

### The Problem

Originally, IMG tracked all of its agents in Excel spreadsheets, using Microsoft Outlook for all communication purposes. This way of managing thousands of agents was cumbersome and only proved useful when looking up basic contact information. In addition, IMG/SSB didn't feel that their communication with prospects or clients could be as personal or effective as they'd like due to lack of contact history. Further, IMG/SSB was rapidly growing, so they needed to know what their agents were doing, who they were selling to, how much they were selling, and more about the clients or prospects they were working with. They began looking for CRMs/Agency Management Systems that would allow them to manage thousands of agents on a detailed level, but also have the ability to create efficiencies for the telemarketing side of their business.

### Our Solution

During an extensive search for CRM/Agency Management Systems, IMG/SSB came across AgencyBloc. Particularly attractive was AgencyBloc's capability to track agents on a granular level, not just track policyholders as they had discovered was the case in other systems. With agent tracking,

IMG/SSB can see prospects, clients, and policies attached to each agent, as well as activity history and lead source performance. They were also looking for a system that could integrate directly with their existing auto-dialer. AgencyBloc's integration now allows their auto-dialer leads to be automatically filtered into AgencyBloc where tasks can then be assigned for follow-up.

### The Result

After 2 years of using AgencyBloc, IMG/SSBs operations are much more efficient. AgencyBloc met their needs of managing 7000+ agents, giving them the ability to assign tasks and follow-ups, view agent activity and manage all internal agent communication. Now, when a prospect or client calls in to speak to one of their agents, communication is efficient and personal with client/prospect information and activity history at their fingertips. With the auto-dialer integration, less time is spent manually entering contacts into a spreadsheet and assigning tasks, and more time is spent calling leads. Overall, Insurance Marketing Group/Senior Security Benefits enjoys AgencyBloc's ease of use and versatility when it comes to managing their agency.



***All of your employees that I have talked to are wonderful to work with, but mainly the ease of the software is great.***



Client Quick Facts:



**Insurance Marketing Group/Senior Security Benefits:**  
www.insmg.com



**Specializes In:**

- Health insurance marketing (FMO/IMO)
- Med supp
- Individual health
- Senior benefits



**# of employees:** 45  
**# of agents:** 7,000+



**Previously using:**  
Excel spreadsheets