

Case Study | Insurance Advocates

About The Company

Insurance Advocates began in 2009 when the founder left a captive company to begin his own company, which now serves 400 clients. Insurance Advocates specializes in life, health, annuities, medicare, dental & vision insurance.

The Problem

Since Insurance Advocates began with one agent, he had his own way of tracking his business within Microsoft Excel. As the company grew and staff members came on board, that way of organization became cumbersome and confusing to other staff members and agents. Any activity an agent had with clients were entered as comments within the Excel spreadsheet. This process inside Excel was very time-consuming and following up with customers was very inconsistent. Insurance Advocates sought an easy-to-use system that would keep them organized as the company grew and would make their data easily accessible to all.

Our Solution

Insurance Advocates switched to AgencyBloc with the help of AgencyBloc's client success team by formatting their Excel spreadsheets and importing the data. With AgencyBloc, Insurance Advocates can now search and edit individuals easily, send email newsletters, and their follow-up process on applications is much more efficient. Their book-of-business is much more organized, and they're able to understand what each team member is doing by glancing at their dashboards. AgencyBloc has created a better workflow for Insurance Advocates, and it helps to keep them accountable on their activities.

The Result

Insurance Advocates has been using AgencyBloc for 2 years, and they have created an efficient and understandable workflow amongst the team with it. They now have a deeper understanding of their clients and prospects, and they have better procedures for following up on applications and other activities. Using AgencyBloc, they have identified touch opportunities with their clients that they didn't see before, and they can quickly and easily find information to work more cohesively as a team.

“With AgencyBloc, we're able to continually grow our business by making every client feel like our priority with timely follow-ups.”



Client Quick Facts:



Insurance Advocates:
www.insurance-advocates.com



Specializes In:

- Life insurance
- Health insurance
- Medicare
- Long-term care
- Annuities



Number of employees: 2
Number of agents: 2



Previously using:
Excel spreadsheets