

Case Study | JTS Financial

About The Company

JTS Financial is a full-service insurance agency founded in 1998 in Little Rock, Arkansas. 12 years later, JTS expanded and entered into the school district market. In addition to large and small group, they focus on worksite benefits, individual health, life, disability, and P&C.

The Problem

JTS faced a serious problem with the amount of time they were spending on commissions processing every month. It would take them nearly the entire month to manually process the commission statements, calculate the splits, enter the information into Zywave's software, and distribute the agent statements to the correct agent. The process was so time-consuming that the commission manager worked after hours and took the statements home on weekends enlisting her husband's help to stay on-top of them all. Even after she hired an assistant, both the manager and the assistant had to let other parts of their jobs fall to the wayside in order to complete the commission statements on time. This made it difficult for them to accomplish much else outside of commissions every month. In addition, JTS found Zywave to have too many limitations for their office for the price they were paying.

Our Solution

In an effort to minimize the amount of time they were spending processing commissions, JTS sought out a new solution. When they encountered AgencyBloc, the commissions manager was drawn to AgencyBloc because of its robust commissions processing capabilities, easy-to-contact customer service, and scalable price point. They found the transition painless and were able to be up and running at full capacity within a few weeks.

The Result

With AgencyBloc, JTS can now easily import various carrier statements, reconcile the files, and generate agent statements all while cutting down their time spent on commission processing **by almost 75%**, saving them nearly **\$33,000 every year**. The commission manager and her assistant were able to gain over **90 hours** back every month to focus on other aspects of their jobs. JTS has grown in the last year and are using AgencyBloc's CRM to manage not only their company, but also their second company, Acuity Group. They're excited to uncover any missed commissions, project future revenues, and compare expected revenues against the actual revenues received to ensure that their carriers are paying them appropriately.

"Switching to AgencyBloc was the best decision I made as a commissions manager."



Client Quick Facts:



JTS Financial:
www.jtsfs.com

JTS FINANCIAL
INTENTIONALLY DIFFERENT.



Specializes In:

- Large & Small Group
- Worksite Benefits
- Life
- Disability
- P&C



of employees: 40
of agents: 35



Previously using:
Zywave