

## Case Study | Parks Insurance, Inc.

### About The Company

Parks Insurance, Inc. is a locally owned South Dakota agency that provides independent insurance agents and consumers access to companies and coverage in the Midwest. In addition, they manage Southwestern Health & Life, a similar but smaller agency located in Arizona. Both specialize in senior insurance products.

### The Problem

In mid-2017, Parks Insurance began transitioning to GBS from another CRM, The Office Manager (TOM). They were running both TOM and GBS simultaneously with a go-live GBS date set for January 2018. When the news hit in December 2017 that AgencyBloc had acquired GBS, Parks Insurance needed to know what would come next. Since they knew GBS would eventually be sunsetted, they wanted to act fast to get both of their companies up-and-running at full capacity in AgencyBloc.

### Our Solution

A week after the acquisition announcement, Parks Insurance signed up for a free trial with AgencyBloc. What ultimately convinced them AgencyBloc was the right solution was the promise of exceptional customer service. AgencyBloc made the transition seamless, allowing Parks Insurance to have both companies up and running in about a month.

### The Result

"Having our hand forced to find a new system turned out to be a blessing in disguise," Sandy of Parks Insurance noted. They described the transition to AgencyBloc from GBS as a "night and day difference." Four months into using AgencyBloc, they've found the ease of use to be "much more

streamlined" than GBS. On the commissions processing side, they've been able to **cut their time by 75%** and have gone from **spending 2 full days on statement imports to only 1 hour each month**. They were especially excited AgencyBloc could handle larger commission imports and that they were automatically populated in the system. One month, Parks Insurance needed to import over 9,000 policies from one carrier into the system. After the import, 97% of the policies linked automatically leaving only 3%, all of which were new business, to be quickly linked. They have found the overall organization of records an important feature, as well. Before, when an agent called in with a question, they would have to hang up, dig to find the correct file, and then call them back. Now, they're able to bring up the file and answer questions immediately since everything is in one centralized, organized location. They're looking forward to beginning to track their commission payments so they can find any potential missed payments from carriers.

### Park Insurance's Advice:

*"If you're on the fence about moving to AgencyBloc, do your due diligence, but try AgencyBloc. We had such a smooth transition. Every 'unique problem' we thought we had, they were prepared for. You will truly benefit from going forward with AgencyBloc; it'll be time saved, dollars saved, and a whole lot less stress."*



Client Quick Facts:



Parks Insurance, Inc:  
www.parksagency.com



Specializes In:

- Medicare Plans
- Health & Life Insurance
- Prescription Drug Plans



# of employees: 9  
# of agents: 100+



Previously using:  
GBS