

Case Study | Sams/Hockaday & Associates, Inc.

About The Company

Founded in 1981 and located in Decatur, Illinois, Sams/Hockaday & Associates focuses on providing insurance products and services to the senior-age market. The products they offer include Medicare Supplement, Medicare Advantage, Life Insurance, Long Term Care and Annuities.

The Problem

Sams/Hockaday had 2-3 staff members using Prime by Vertafore. The system was outdated, not user-friendly, and commissions processing was a very time-consuming process. The accounting department had to manually export data and transfer it into a different system just to process commissions. The database was not accessible to agents, therefore they could not review their book of business or contact information as they were trying to grow the business. Sams/Hockaday sought a system where each agent could see their own book without getting into file cabinets and where they could set activities and reminders for themselves and others. Overall, they wanted to be more in control of their data and their time.

Our Solution

Sams/Hockaday made the move to AgencyBloc for its commissions processing and policy management capabilities where each agent could see their own book. Data export from their old system was cumbersome, and their customer support was not helpful. And because each staff member that had access to the old system was organizing data in their own way, some data cleanup was required before importing into AgencyBloc; however, AgencyBloc was able to guide Sams/Hockaday to a successful and organized import.

The Result

Sams/Hockaday's agents are operating much more efficiently now that they have access to their data; agents are especially happy about accessing information from their phones because they spend so much time out of the office. Since their commissions processing time was cut tremendously, their bookkeeper is able to work on more productive things than data entry. Sams/Hockaday appreciates that AgencyBloc is web-based and that the application gets upgraded automatically with the latest features.. One upgrade they're most excited about is the Email Campaigns feature. They want to use it in conjunction with the "Cross-Sell" report in AgencyBloc to identify opportunities and use email marketing campaigns to sell to them.



Everyone here at Sams/Hockaday is really happy with the sense of control they now have with AgencyBloc.



Client Quick
Facts:



Sams/Hockaday &
Associates:
www.samshockaday.com

Sams/Hockaday
& Associates, Inc.
Insurance for Seniors



Specializes In:

- medicare supplement
- medicare advantage
- life insurance
- long term care
- annuities



Number of employees: 3
Number of agents: 10



Previously using:



Vertafore