

Case Study | Sonic Insurance

About The Company

Founded by Chris and Melissa Harvey, Sonic Insurance is a full-service insurance group based in Ponte Vedra Beach, Florida, passionate about finding quality, affordable insurance options for their clients.

The Problem

The most significant problem Sonic Insurance faced was the fact that Velocify (their previous CRM) didn't provide them with a commissions processing platform. They would have to print out each carrier's commission statement and manually track everything via Excel and paper files. Additionally, they found that Velocify's platform wasn't "intuitive enough" for them and it lacked automated capabilities that would help them make their day-to-day processes more efficient. They needed a system that could grow with them and allow them to expand their focus beyond their current daily activities.

Our Solution

After researching, trialing, and demoing multiple life and health insurance specific agency management systems, they chose AgencyBloc because they believed it "had the cleanest interface, was the most aesthetically pleasing, and was easiest to navigate." The Automated Commission module and the Automated Workflow feature heavily influenced their decision to move to AgencyBloc. These two pieces alone have helped them simplify their daily processes, improved and allowed them to focus on other necessary tasks that come with owning their own insurance agency.

The Result

Sonic Insured has experienced significant time savings with AgencyBloc allowing them to focus on other aspects of their agency and expand their team. In the year since they've joined AgencyBloc, they've **doubled their agent force and increased their bottom line 100%**. With AgencyBloc's Commission Module, they **save 10 hours every month in manual commission tracking** over Excel. Chris **boosted his productivity by 20%**, allowing him to focus more on revenue generating activities, while Melissa **gained back 30% of her time** in policy management, commissions, and additional back-office work. They streamlined their entire process by setting up Automated Workflows to track and alert them of important changes like turning 65, policy cancellations, non-payments, new applications, and more. The workflows have also been a huge help to them during OE and AEP. They use activities to track client communication and meetings to help them stay compliant with Medicare standards and E&O. They're excited to continue their growth and scale their book of business with the help of AgencyBloc.

"AgencyBloc has allowed our agency to tap into underutilized potential."



Client Quick Facts:



Sonic Insurance:
www.sonicins.com



Specializes In:

- Health Insurance
- Medicare
- Property Insurance
- Commercial Insurance



of employees: 2
of agents: 5



Previously using:
Velocify