The #1 Agency Recommended Management System *for life & health agencies*

Agencies who've switched to AgencyBloc have...

- Doubled their agent force and **increased their bottom line 100%**
- **Saved 100 hours** every renewal period in sending notices to clients
- Spent **75% less time processing commissions**
- **Found tens of thousands of dollars** in missed commissions from carriers

AgencyBloc is an agency management system (AMS) that helps you:

- Manage your clients, prospects, groups, policies, agents, and carriers all in one place
- Automate your workflow to work smarter, not harder and ensure important tasks are never missed
- Save serious time and resources in commissions processing
- Close more deals with a sales management tool built for your industry

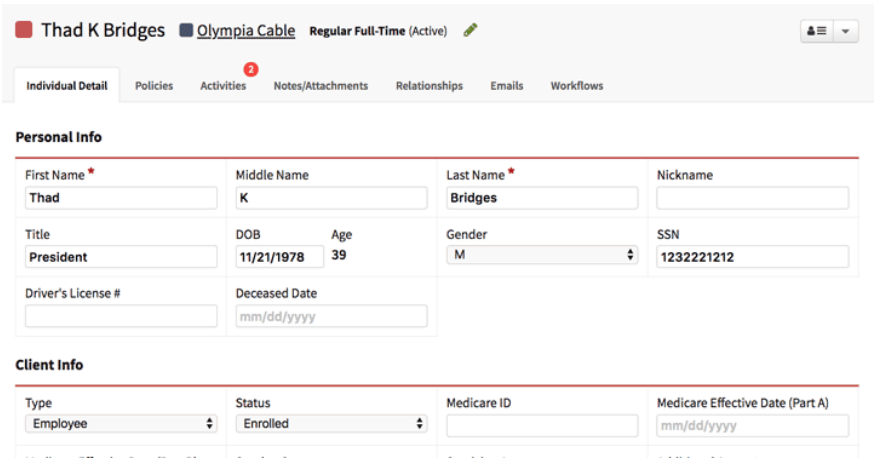
"My bottom line is really that **I wholeheartedly recommend this system.**"
—MORTEN S., INSMED INSURANCE AGENCY

"In the first year alone, **my savings on commissions processing and recovering missing commission payments more than paid for my AgencyBloc subscription**. It has saved me money and it has made me money."
—MATT T., CENTRAL OHIO GROUP INSURANCE AGENCY, INC.

See **www.agencybloc.com/testimonials for more than 140 agency testimonials**.

Agency Management System for Life & Health Agencies

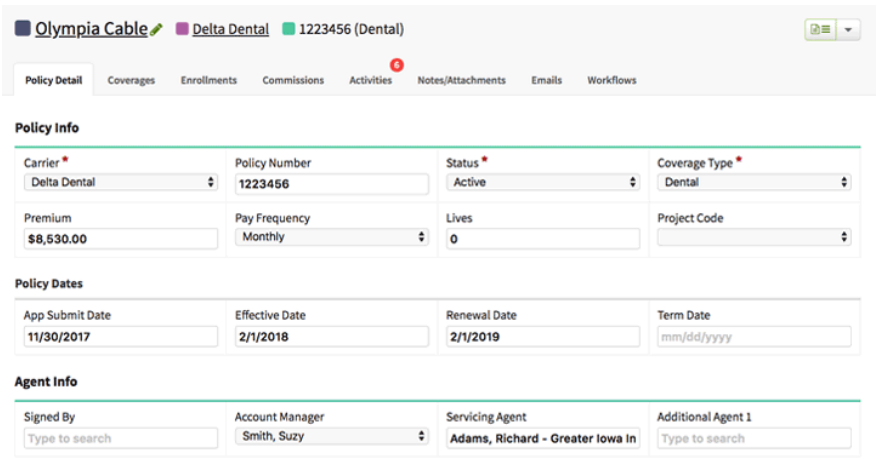
Industry-Specific CRM



A CRM built for Insurance Agencies

Don't trust your book of business to a generic CRM or spreadsheets. AgencyBloc is designed specifically for life and health insurance agencies who want to run an efficient and organized agency. Manage your agency more effectively with thorough client, prospect, and policy tracking, including enrollments and elections. With AgencyBloc, all the necessary information is in one place.

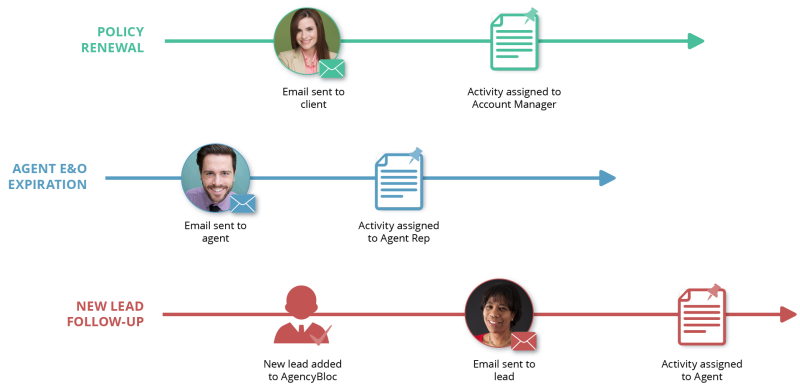
Policy Management



Policy Management

Having difficulty keeping track of all policies sold to a particular individual or a group, where each policy is in the application process, seeing who's enrolled, or when it's up for renewal? With AgencyBloc, connect policies with individuals and groups, set up automatic tasks or reminders for important dates or actions, and always be aware of the policy/product makeup of your agency.

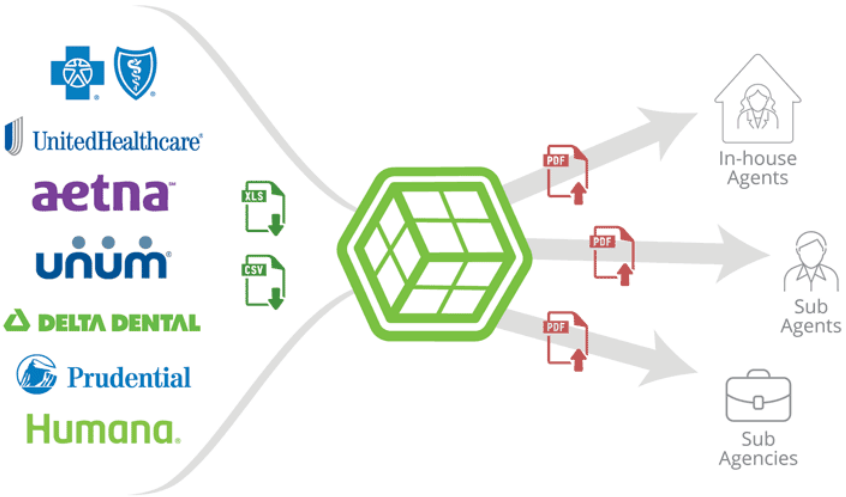
Automated Workflow



Automate Your Agency

Automated Workflow helps you spend less time on manual, time-consuming tasks and more time on your clients and prospects. When an event is triggered in AgencyBloc, a predetermined activity is created or email is sent. Create automated workflows to assign tasks to agents when a due date approaches, send emails to clients when their renewal date is near, and send emails to prospects to maintain contact.

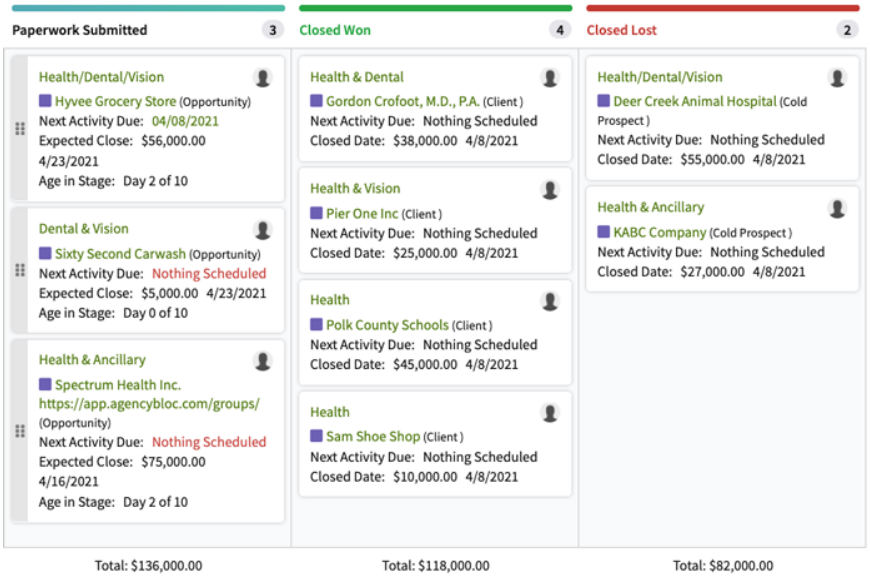
Commissions Processing



Process Commissions Quickly and Correctly

Spending countless hours manually processing commissions? With AgencyBloc's proprietary mapping software, just import the carrier statements each pay period and AgencyBloc will take care of the splits for you. Our Commission Module makes sure that carriers are paying you everything they should be and that your payments are accurate.

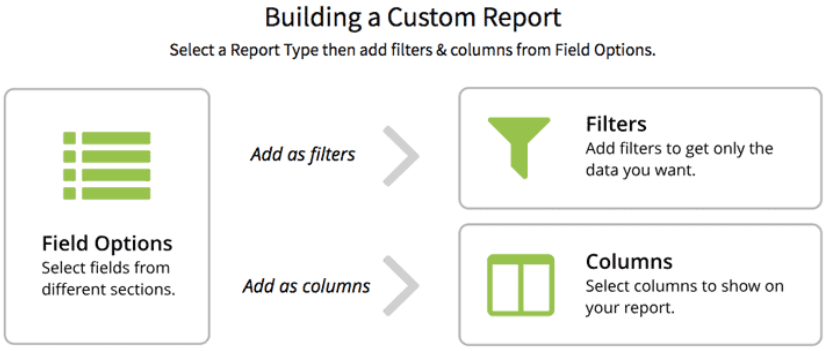
Sales Management



Successfully Work Leads & Close Deals

Capture leads on your website with AgencyBloc's integrated lead forms or through partner APIs. Work leads and opportunities as they move through your sales process. Customize sales pipelines to fit your specific business needs and improve the processes you already have in place today.

Custom Reporting



Build Insightful Reports

Run any of AgencyBloc's preset, industry-specific reports for reviewing data like lead sources, agent license renewal dates, carrier products, and more. Or, build your own custom reports on individuals, groups, agents, policies, carriers, and commissions. Save the criteria and columns, and share with other teammates at your agency.

See www.agencybloc.com/tour for a 5-minute overview video as well as more in-depth feature descriptions and screenshots.

Key Features of AgencyBloc

Industry-Specific CRM with Policy Management
Manage prospects, clients, policies, agents, carriers, and more in an industry-specific CRM in a way that's simply not possible in generic CRMs. Track policyholder info, enrollments & elections, coverage data, and more.

Commission Module
AgencyBloc has helped agencies spend up to 85% less time processing commissions. The Commission Module saves you time and resources, helps you identify missed commissions, and gives you insightful commission insights.

Lead & Sales Management
Effectively work leads and track sales opportunities through customizable board-view pipelines for every type of business you do.

Workflow Automation
Automated workflow helps you spend less time on manual, time-consuming tasks. Automatically assign tasks to agents and send emails to clients so no important tasks or touchpoints are missed.

Dashboard Analytics
Get a quick glimpse on the health of your agency with real-time graphs and charts. Dive deeper for valuable insights through custom reporting.

Custom Reporting
Reporting directly from your AMS helps you understand the overall trends in your business so you can make more informed decisions.

Email Marketing
Stay in contact with your clients, prospects, and agents with an email marketing platform built directly into your AMS.

Cross-Selling
Grow your book of business from within by utilizing your AMS to help you identify and act upon cross-sell opportunities quickly and easy.

Cloud-Based Access
Access your book of business from anywhere on any device with an internet connection.

Secure Data
SSL (Secure Socket Layer) encryption, the same technology used in top online banking and e-commerce sites, keeps your data safe. Data is stored on HIPAA-compliant servers.

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AgencyBloc vs. Generic CRM/Other AMS Software

***Varies by vendor; check with each vendor to see if that feature is available*

FEATURE	AgencyBloc	AMS	CRM
Track Clients	✓	✓	✓
Track Prospects	✓	✓	✓
Track Groups	✓	✓	
Track Group Enrollments & Elections	✓	**	
Track Agents	✓	✓	
Track Policies	✓	✓	
Track Carriers	✓	✓	
Email Marketing Automation	✓	**	**
Automated Workflow	✓	**	**
Email Campaigns	✓	**	**
Cloud-Based Access	✓	**	**
Data Backup	✓	✓	✓
CRM Data & File Storage	✓	**	✓
Third-Party Integrations	✓	**	**
Lead Management	✓	✓	✓
Industry-Specific Reporting	✓	**	
Industry-Specific Analytics	✓	**	
Process & Track Commissions	✓	**	
Project Commissions	✓	**	

The AgencyBloc Experience

AgencyBloc is more than just software. **We're the #1 Agency Recommended Management System for life & health agencies because of the *experience* our clients have** from that first contact to ongoing support.

Our mission is to provide powerful solutions by making the convoluted, straightforward. **We want our technology to transform the organizations that use it.** We believe that in order to fulfill our mission, we need to solve problems for our customers by giving them the right tools, educating them, and supporting them along the way.

Visit **www.agencybloc.com/experience** for more information on the transition and ongoing support you can expect.

"AgencyBloc has been helpful, positive, and **responsive in helping us address our needs from onboarding to ongoing**. It's allowed us to present ourselves professionally and maintain office transparency. We've been extremely pleased with the attention they give their clients and their desire to always be improving their system."

—DAVID B., BRYSTRA INSURANCE SERVICES

"**AgencyBloc is fantastic as a system, but it's better because of the team behind it.** They're always there to give us support on the spot. Knowing that we can always pick up the phone and call them, it's as valuable as the system to us."

—CHRISTINE H.., HÜBLER INSURANCE SERVICES

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