

## NW Medicare Advisors

See how NW Medicare Advisors moved beyond generic software to AgencyBloc's industry-specific solution — quadrupling their agent staff, tripling their client base, cutting commissions processing time by 75%, and saving critical hours on compliance.

**NW**

Medicare Advisors  
A Non-Government Agency

**Specializes In**  
Medicare

**Previously Used**  
Salesforce, Microsoft  
Dynamics, Spreadsheets

**Agents**  
40

**Employees**  
1

**Website**  
[nwmedicareadvisors.com](http://nwmedicareadvisors.com)

**NW Medicare Advisors is a fast-growing West Coast Medicare Field Marketing Office (FMO) committed to empowering agents through education, tools, and support. The organization began as a captive insurance agency in 2018, then reincorporated in 2020 as an FMO with a new name and brand.**

### The Problem

In 2020, NW Medicare Advisors began its FMO journey and looked to expand its agent base. They identified two critical elements they needed for their growing business:

1. An agency management system (AMS) that has all the vital tools a growing Medicare FMO needs to run operations
2. A centralized solution that their remote agent base could leverage to stay organized and productive

As a long-time agent, the owner of NW Medicare Advisors had experience with a wide variety of tools, like Salesforce, Microsoft Dynamics, and spreadsheets. They found that these generic solutions required extensive customization and project management — either through hands-on efforts or outsourcing. While functional, these systems are not built for the health insurance industry and lack essential tools agencies need to thrive.

**4X**

growth  
in agent  
staff

**75%**

reduction in time  
spent processing  
commissions

**3X**

growth in  
their client  
base



**“AgencyBloc has helped with the organization and consistency day-to-day. Consistency is key for our agency to succeed.”**

**Jeffery D.** | NW Medicare Advisors

## Our Solution

“The last time I migrated to a different solution, I picked it by price. This time, I wanted to pick the solution that fit my industry and my needs.” With experience using various CRMs, NW Medicare Advisors prioritized finding a solution tailored to the insurance industry that could also serve as their long-term partner. Additionally, they wanted a platform that included industry-specific functionality, like commissions processing and built-in compliance management. For them, AgencyBloc’s comprehensive platform checked all the boxes.

## The Result

Since implementing AgencyBloc in 2023, NW Medicare Advisors has **quadrupled its agent staff and tripled its client base**. The agency expects to **grow an additional 50% by the end of 2027**. “One of our goals for next year is to increase our efforts for agent prospecting. We know we’re set up and ready with AMS+ supporting us.” In fact, AMS+ is a retention tool for their team as it provides new agents with immediate access to a ready-to-use insurance CRM that helps them overcome the early hurdles in insurance sales.

In addition, having the leading commissions processing tool on the market has been a game-changer for NW Medicare Advisors. Using Commissions+, NW Medicare Advisors has been able to **cut their time processing commissions by at least 75%**. This allows them to focus on other revenue-generating tasks while giving them peace of mind about the accuracy of their commission payments.

Lastly, the built-in **Scope of Appointment (SOA) tool saves NW Medicare Advisors over an hour daily during peak times of the year, like Annual Election Period (AEP)**. Now, they can send the SOA to all beneficiaries with a single click and automatically retain the signed versions securely in their records. Using the built-in SOA feature reduces the compliance headaches for new agents and ensures everyone stays aligned with industry regulations.