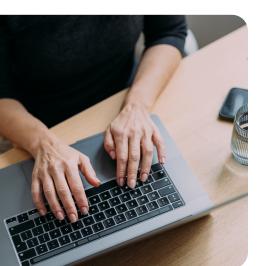


CASE STUDY





Specializes InMedicare

Previously Used

Salesforce, Microsoft Dyanmics, Spreadsheets

Agents

40

Employees

1

Website

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.

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

NW Medicare Advisors

by 75%, and saving critical hours on compliance.

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-today. 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.