

## Transition Health Benefits

Discover how Transition Health Benefits grew their book of business by 60%, streamlined commission processing, and empowered 200+ new agents by switching from File Maker Pro to AgencyBloc's Commissions+.



**Specializes In**  
Medicare, ACA, Small  
Group

**Previously Used**  
File Maker Pro

**Employees**  
15

**Agents**  
561

**Website**  
[transitionhealthbenefits.com](https://transitionhealthbenefits.com)

Transition Health Benefits is a General Agency (GA)/Field Marketing Office (FMO) located in Brookfield, Wisconsin. Since the 1980s, Transition Health Benefits has focused on providing individual insurance, including Medicare. Today, they support 550+ agents (W2 and 1099) in 35+ states in sales, marketing, and client retention.

### The Problem

Transition Health Benefits had been using File Maker Pro (FMP), an on-premise generic application for business management, since the 1980s. While FMP provided extensive customization opportunities, the application required significant manual management, was only located on one computer, and didn't provide a user manual or support. "I had to memorize our entire payout structures and manually input payouts into FMP each commission run. Then, once commissions were done, I had to email each agent's statement individually. It took a lot of time, and I wanted to grow my role to focus on selling more." With over 350 agents at the time, this process hindered Amanda's ability to grow and created an issue of training should Transition Health Benefits ever hire additional commission positions.

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**“AgencyBloc has helped my productivity. It has allowed me to focus on selling and not make commission management my entire worklife. I am a lot more efficient and can much more easily get the information to our agents in a space they can always access.”**

**Amanda M.** | Transition Health Benefits

## Our Solution

“The fourth quarter of 2021 was incredibly busy. I just couldn’t support the commissions for the entire company with File Maker Pro any longer.” When Transition Health Benefits began their search for a new commissions processing tool, they primarily considered generic payroll systems. However, those tools didn’t provide the features they needed to support their growing agent base and complicated payout structure. “We looked for a long time and didn’t find anything. Then, one day, we got an email from AgencyBloc’s Sales Team about commission efficiencies; the rest is history. We did a demo, and once I saw the payee schedule, rate tables, and statement portal for agents, I was sold.”

## The Result

“Before, the majority of my month was spent processing commissions and sending agent statements with a little selling on the side. Now, 40% of my job is managing commissions and I can spend more time selling!” In the three years since becoming a Member of The Bloc, Transition Health Benefits has **grown their book of business by 60% and brought on 200+ more agents.**

Before, Amanda would spend a week uploading and managing carrier commission statements. With Commissions+, she can **upload all of the statements for the growing business in 1-2 days.** “The mapping capability is huge for us. It’s so much more efficient because the rate tables and payee schedules automatically apply. Then, I can run through the red edits and make small adjustments as needed.” Another significant time-saver is the agent statement portal. Transition Health Benefits provides all of their downline agents with Agent Statement User licenses in AgencyBloc so they can log in and see all of their commission statements. **“It’s actually a selling point for our agency because our agents have their own portal and can see all of their current and past statements.”**

However, one of Amanda’s favorite parts of AgencyBloc is the support provided. File Maker Pro was just an application downloaded on a computer. It didn’t have any training or support, making learning difficult. **“With AgencyBloc, I’ve had support from day one.** It is a higher learning curve, but the videos were really helpful in understanding the intricacies of Commissions+. Plus, there is the Support Chat feature which makes it easy for quick answers.”