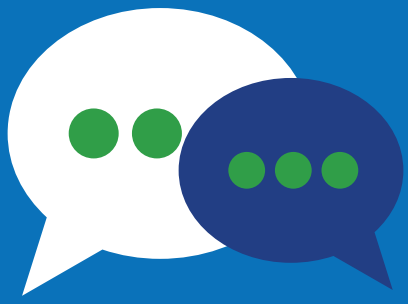
The Importance of Following-up:
The 30-60-90 Day Framework

Why Following-Up Matters?

- Gains insight on whether the client is happy with their plan or if they need additional help
- Builds trust and long-term relationships
- Increases referrals and new business
- Improves client satisfaction and retention
- Establishes you as educational resource



When Should You Reach Out?

The *30-60-90 day follow-up framework* is a great place to start until you can discover what works best for you and your clients. This strategy is a simple schedule to check in with clients 30, 60, and 90 days after enrollment. This reliable, easy-to-follow method works for all your clients and ensures no one is missed without becoming overly persistent.

What Should You Talk About During the Meeting?

Each client will be different, but below we've outlined what you should expect during each meeting and some topics that you will want to go over in each meeting to get a good idea of your clients experience in the plan.

	What to Expect	Topics to Discuss
30-Day Meeting	At this stage, many clients haven't fully used their plan yet. Recommend scheduling an annual wellness visit to confirm the plan fits their needs, and come prepared with helpful materials like brochures and customer service contact information.	• Plan membership cards • How to make payments • In-network doctor availability • Prescription fulfillment experience • Any benefits of the plan
60-Day Meeting	This meeting builds on the first. Some clients will be able to provide feedback on how they are using their plan, and you can either proceed with a refresh of the last meeting or adjust the plan as needed.	• Refresh on topics from last meeting • Star ratings & Medicare plan surveys • Any special programs in the area for Medicare eligible individuals • Preventative care measures *(flu shots, cancer screening, etc.)*
90-Day Meeting	By this meeting most clients know if their plan is working. Agents can fix any issues right away and if they're satisfied remind them they can contact you anytime with questions or concerns.	• Refresh of the topics covered in the 30-day and 60-day meetings • Special enrollment periods • Referrals

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