



Effective Client Retention Tips for AEP

*An Exclusive
Health Agent Guide.*

**For agent use only. Not for public distribution .*

Contents

3.....	Client Retention Tips: Pre-AEP
4.....	Client Retention Tips: AEP
5.....	Client Retention Tips: Post-AEP
6.....	Why Partner with Agent Pipeline?
7.....	Sources



Client Retention Tips

Clients changing plans, plan types, and even agents is something that is unavoidable as your clients' coverage needs change. One of the most important tactics for you as an agent is to keep up with these changes and retain your book of business. Let's look at the many things you can do throughout the year that may help you **retain your clients and their satisfaction with their coverage**.

Pre-Annual Enrollment Period (AEP) Tips

Before September 30th



Recertify early.

It is highly important to do any certification tasks months before AEP to ensure you are licensed when AEP comes around.



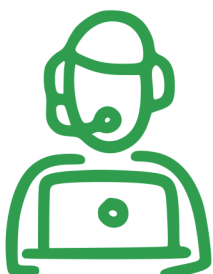
Maintain good relationships all year long.

Send cards for birthdays and other special occasions. Maintaining contact throughout the year helps to keep yourself at the top of your clients' mind.



Understand how clients will be affected when plans change.

Having a good understanding of the plans and how they affect certain clients can give you a competitive edge in the ever changing world of Medicare.



Develop a game plan to contact clients when AEP begins on October 15th.

Ensure you are prepared with the correct contact information for your book of business so contact is simple and easy.

**For agent use only. Not for public distribution.*

AEP Tips

October 15th - December 7th



Educate clients on plan changes.

When meeting with clients, make sure they are aware of any changes in their current plan or any plan they may be interested in.



Set up sales meetings as plans *change*.

The Medicare space is ever changing. As plans and rules change, you can be sure your clients are in the loop by scheduling 1-on-1 meetings.



Listen to and understand client concerns.

During the AEP is a great time to get to the bottom of your client's concerns. That way you both understand their needs and you can determine the right plan to fit these needs.



Help clients find plan options that meet their *unique needs*.

Once you have determined the full picture of the healthcare needs of your client, you can easily find the right plan for them during AEP.

From October 15th – December 7th, knowing what your clients want in their coverage and having an efficient enrollment process is key. Look for gaps in client coverage that need filled and present the plans during the enrollment process. Before the Annual Enrollment Period ends, be sure you've met with any client's needing to change their plan or get a new one.

Please note: Plans can not be discussed with beneficiaries prior to October 1st.

**For agent use only. Not for public distribution.*

Post-AEP Tips

After December 7th



Keep updated on plan changes and the enrollment statuses of your clients.

Post-AEP is a great time to get your book of business organized and updated with any new plans for existing clients or with new clients you may have picked up.



Follow up with clients and determine their satisfaction with their plans.

Following up with meetings or phone calls can help you determine how satisfied your clients are with their AEP decisions.

After the Annual Enrollment Period is a great time for **organization, client feedback, and client meetings**. Hopefully, your book of business has grown during the busy AEP season but, if you don't already have an organizational system for this growth, this may cause headaches. Not to worry though, as the first couple months post AEP are a great time to **update client information and develop an organizational system**, which may lead to more time with clients. Gathering your client's feedback is important as well. Spend some time **creating or locating a client survey that will allow your clients to voice their opinions on how you are handling their healthcare needs**. Lastly, this is a great time to meet with your existing clients and review their new or existing coverage.

Why choose Agent Pipeline?

Agent Pipeline is a Field Marketing Organization (FMO) specializing in Medicare, Individual Health, Life Insurance, and Ancillary & Supplemental Products. Our core values are **integrity, family, service, respect, and partnership**, and allow us to exceed agent expectations. We are always developing new products to meet the changing needs of insurance agents and demands of beneficiaries.

When you partner with Agent Pipeline, you gain access to:

Best-in-class service with local trained market experts & business consultants.

Exclusive access to proprietary insurance products, technology, lead programs, and marketing support of Agent Pipeline **and more!**

Agent Pipeline is equipped to help agents anywhere with our proven-successful growth and development strategies. **Ready to get started?** Contact us today!

Contact us

800.962.4693

agentpipeline.com

Visit us on social media



@agentpipeline

**For agent use only. Not for public distribution.*

Sources

Humana. How to Leverage the Agent of Record Pledge during AEP. edited by Humana, Humana, pp. 1–6. Accessed 9 July 2024.