



**'LINKING PRODUCER TO MARKETS'**

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*After the Sale...*

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# What do I do after the sale?

Your client base is your fiscal lifeline, and they can change coverage each eligible enrollment period. Some, like dual eligible (Medicare/Medicaid) customers, are able to change plans monthly. You don't want your client changing plans without reaching out to you, their agent. One way to insure this is to “touch” them 3 or more times with a telephone call.



# What do I Say?

The first “touch” call could be to ask them if they received their welcome call, welcoming them to the new health plan or the outbound verification call. You may want to call in a day or two after you submitted their enrollment. Check to see if they have any new or remaining questions and **ASK FOR REFERRALS**.

***MIPPA ALERT: Remember – the referrals need to call you, as you cannot reach out to them and stay compliant!***



# The Second Touch Phone Call

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When you call the second time you may want to ask if they have received their ID card from the Health Plan. You will probably want to make this call close to the first of the month of their effective date.

Check again to see if they have any questions and **ASK FOR REFERRALS**. Let them know that you would be happy to help their friends and neighbors too.

What is the first thing people usually do when they want to buy something?

They ask a friend.

# Reach out and “Touch” # 3

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The third time you call you may want to see if they have had an opportunity to see their doctor on the new plan. This should be made when you think they have used the plan, possibly the second month on the new plan. This is especially important if this is a new doctor for them. Ask again for REFERRALS and if they have additional questions.



# Another Reason to Reach Out

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Most of the Health Plans offer yearly physical exams. Remind your client that they have an annual exam benefit, and they should take advantage of that benefit.

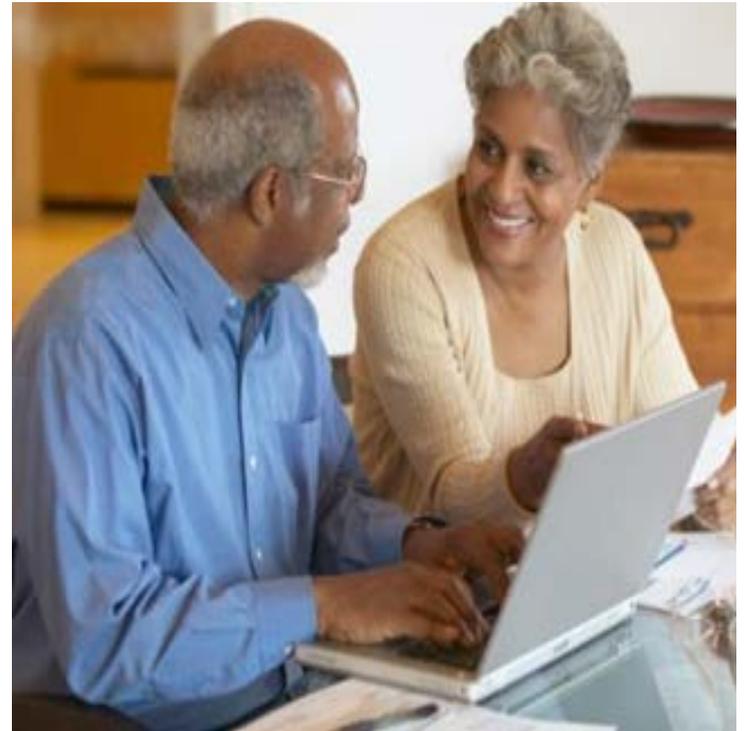


# Let your Customer know you CARE

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Once you have reached out to your customer three times or more they are much more likely to reach out to you for their insurance needs and see you as their personal agent. Expand your offerings and become your clients' most trusted advisor.

Focusing on your customers' long term needs and their lifetime value to your business helps you compete and remain profitable.



# Make the Calls Part of Your Routine Follow up Process

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Make sure all of your clients reach out to you for their insurance needs.

It is a perfect time to cross sell with other products such as Final Expense, Long Term Care, Annuities, Dental Hearing and Vision, Cancer Policies and other Life Insurance Products.



# Find out Your Client Needs

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Use a fact finder to uncover your clients needs.

In many cases, people are so busy with their lives, that by forcing them to sit, stop, and think about their life's goals, you're actually helping them discover things about themselves that they didn't even know before.

When this happens, you've made a client and a friend for life.



# Why Cross Sell?

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The more knowledge, education and product you have to offer, the greater your likelihood of building **strong client relationships**—and a financially sound business.





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**Thank you!**