

Start Your New Medicare Clients Off Right With These Helpful Tips!



Now that you've made the sale, it's time to focus on building long-term relationships with your Medicare clients. By following these tips and best practices you are more likely to keep the new clients you worked so hard to get:

Make a quick call to confirm they received all their plan specific materials. Some ways to kick off that conversation include-

- Introduce yourself and let them know why you're contacting them. Here's an example.
I am calling to make sure you received all of your material and to see if you have any questions about how to use your benefits. I want to make sure you get everything you paid for.
- Confirm they received their member ID Card. Are they comfortable with their PCP selection? If not, have them contact the Member Services number on the back of their ID card. If they have any questions or concerns about their prescription coverage (such as setting up mail-order prescriptions or finding a pharmacy), have them call the Pharmacy Services number.
- Next, make sure they received a new member welcome kit. Check to see if they have any questions about how to access supplemental benefits such as Over-the-Counter (OTC) benefits, Transportation, Personal Emergency Response System (PERS) or SilverSneakers?
- Ask if they have registered and completed the process to set up a digital member account. It's easy—they just need to visit **empireblue.com** to get started.

During these calls it's important to remain compliant-

- Remember no cross-selling is permitted. If a client wants to discuss a non-healthcare product during a follow up call—you may ask them to call back or schedule a separate appointment.
- Agents may not market the ability to make plan changes during the Medicare Advantage open enrollment period. A member must initiate the conversation.

Questions? Contact your Regional Sales Manager.

Our Medicare Agent Support team is also available to answer your questions. Email medicareagentsupport@anthem.com or call 1-888-633-4368.