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NEXT  LEVEL

WHAT COMES NEXT:

Mid-OEP Momentum

Adjust, Accelerate, Achieve



The Midpoint Moment

We are halfway through MA OEP. This is where agents:

- Adjust their strategy
- Accelerate their activity
- Achieve their Q1 goals

Today is about execution — not information.



Adjust: Learn for the 1st 45-Days

Ask:

- What worked during early OEP?
- Where did you lose business?
- Where are clients experiencing friction?

Midpoint is about course correction.

If something isn't producing — adjust it.



Adjust: Putting a Bow on AEP

Early OEP: Clean up AEP mistakes.

Mid OEP: Proactively audit satisfaction.

Action Step: Call every AEP enrollee.

Ask:

- How are prescriptions pricing?
- Any provider issues?
- Any unexpected costs?

Document issues immediately.

Adjustment = opportunity.



Adjust: Identify Friction Points

Now members have:

- Used their cards
- Filled prescriptions
- Visited providers

This is when dissatisfaction surfaces.

Your job:

Find the friction before they complain.



Adjust: D-SNP & C-SNP Review

Midpoint is prime review time.

D-SNP:

- Verify Medicaid status
- Check LIS levels
- Confirm benefit coordination

C-SNP:

- Ask about new diagnoses
- Review chronic eligibility
- Adjustment means aligning them with the right plan — not just any plan.



Accelerate: Reignite Momentum

Momentum fades if you let it.

Re-engage:

- “Let me think about it” prospects
- Incomplete applications
- No-shows from AEP appointments

Acceleration requires activity.



Accelerate: T65 & Delayed IEP Pipeline

IEPs don't pause for OEP.

Midpoint strategy:

- Continue T65 outreach
- Connect with strategic planners
- Target working-age Medicare beneficiaries

Parallel pipeline = stable revenue.





Accelerate: Strategic Partners

Every January, provider offices have patients whose new MA plans don't work.

- Find the friction.
- Partner with the office.
- Fix the coverage.
- Write multiple apps.

One provider relationship can unlock an entire waiting room.



Accelerate: 5-Star Strategy

5-Star plans are leverage.

Use them to:

- Solve dissatisfaction
- Upgrade plan quality
- Move outside traditional timing constraints

Know which 5-Star plans exist in your footprint.

Prepared agents move faster.



Accelerate: SARs

Proactively check:

- Provider participation
- Hospital systems
- Service Area Reductions (SARs)

Call clients before they discover problems.

Speed builds trust.



Achieve: Production Checkpoint

Midpoint Audit:

- How many OEP enrollments?
- How many check-in calls completed?
- How many D-SNP reviews?
- How many referrals generated?

Numbers don't lie.

Achievement requires measurement.





Achieve: Protect & Grow

OEP is not just about new enrollments.

It's about:

- Retention protection
- Reputation strengthening
- Referral cultivation

Every proactive call increases lifetime value.





Achieve: The MA OEP Finale

Break remaining OEP into 3 lanes:

Lane 1 – Retention

- Call every AEP client.

Lane 2 – Correction

- Identify dissatisfaction & misalignment.

Lane 3 – Expansion

- D-SNP, C-SNP, 5-Star, T65.

Simple. Focused. Executable.



Compliance **Reminder**

During OEP:

- One MA change allowed
- Cannot market as “extra enrollment period”
- Must follow all scope rules

Strong finish. Clean business.



The Agent Who Wins OEP

Not the busiest.

The most:

- Intentional
- Organized
- Consistent
- **Adjusts** when needed.
- **Accelerates** activity.
- **Achieves** results.



7-Day Action Challenge

Next week:

- 25 AEP follow-up calls
- 10 D-SNP eligibility checks
- Identify all 5-Star options in your counties
- Schedule 1 educational touchpoint
- Reconnect with 5 undecided prospects

Action creates achievement.



Final Thoughts

Mid OEP is not the slowdown.

It is the separation point.

- Agents who Adjust early...
- Accelerate intentionally...
- **Achieve consistently.**



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Thank You!