

# ICBN

NEXT  LEVEL

## WHAT COMES NEXT: **Q2 Strategies**

Three Ways to Win Now, Grow Your Business, and Prepare for AEP

# Why **Q2** Matters

## **Q2 Sets the Tone for Your AEP**

- AEP is ~190 days away
- What you do now determines your pipeline later
- Momentum built now = confidence + production in Q4

**Top agents don't wait — they prepare early**



# Today's Focus

## Three Paths to Win in Q2

1. Write business now
2. Build something bigger than yourself
3. Develop strategic partnerships

**There's no wrong choice —  
but doing nothing is the risk**



# Strategy 1: Write Business Today

## Production Starts Today

- Business is available right now
- Focus on immediate opportunities
- Build income today **AND** for the future



# Where to Find Business

## High-Opportunity Segments

- Turning 65 (aging in) / Delayed retirement
- Special Enrollment Period (SEP) clients
  - C-SNP eligible individuals
  - D-SNP eligible individuals
  - 5-Star plans
  - New movers into your area
- Plan terminations in your market (SAR)

**Don't Forget the "Problem Children" – Patients with poor reimbursing plans**

# Think Long Term

## Today's Work = Tomorrow's Revenue

60 apps (Q1–Q3)

≈ \$2,000/month in renewals (2027)

≈ \$24,000 annual recurring income

**“Pay yourself today — and again next year”**



## **If You Want More Sales, Do This Now**

- Review your current book of business / Pharmacy PMS
- Identify SEP opportunities
- Work pharmacy and inbound leads
- Schedule appointments weekly
- Track activity and results



# Strategy 2. Build Something Bigger!

## **Start Scaling Your Business**

- Move beyond solo production
- Leverage relationships
- Build a team around you



# Who Should You Recruit

## **Look within Your Network**

- Pharmacy connections
- State association contacts
- GPO relationships
- Professional networks
- People you trust



# **Your** Role in Growth

## **Simple but Powerful**

- Make the introduction
- Share the opportunity
- Encourage and mentor
- Help new agents get started

**ICBN does the onboarding and training for you**

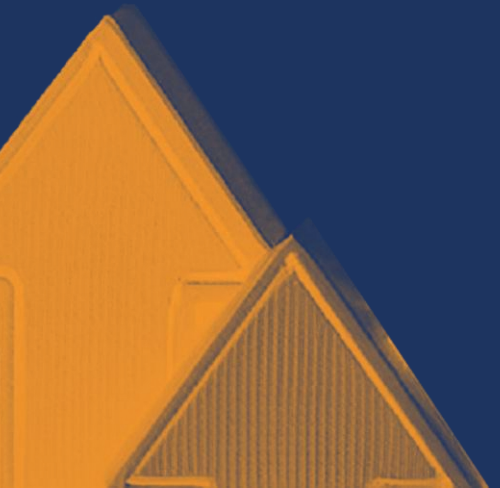


# **Why** It Matters...

## **Build Long-Term Business Value**

- Override/admin income opportunities
- Expand production beyond yourself
- Create a scalable business model

**Start now → Agents ready by AEP**



# Strategy 3. Strategic Partnerships

## **Grow Through Relationships**

- Providers face the same plan frustrations
- They know which plans work (and don't)
- They interact with Medicare patients daily



# The Opportunity

## **One Strong Partner = Major Growth**

- 1 physician office = 100+ enrollments during AEP
- Consistent, ongoing lead flow
- High-trust referrals



# Who to Partner With

## Build Your Referral Network

- Physicians & medical practices; prescribers
- Chiropractors
- Home care providers
- Dentists
- Financial advisors
- Property & casualty agents
- Community professionals/organizations serving seniors

**These relationships are underutilized assets.**

# Action Plan: Strategic Partnerships

## Start Building Now

- Identify 3–5 key partners
- Offer value + return referrals
- Take partners to lunch
- Reconnect with existing relationships
- Ask for referrals



# Strategic Partnership Relationships

## Improve your Relationship with them — Make It About Mutual Value

Conversation focus:

- Explain the value of your services — how they improve patient outcomes
- Show how you help their patients — reduce confusion
- Position your services as a revenue and care extender for *them* — Increase adherence & improve reimbursement rates
- Discuss how can they leverage you more intentionally?

### ICBN Challenge:

- Write down 10 strategic partners
- Schedule breakfast, lunch, or coffee with each

# The Big Picture

## Three Paths, One Goal

- Write business → Immediate income
- Recruit agents → Scalable growth
- Build partnerships → Long-term pipeline

**You can choose one — or combine all three**



# The Real Risk... Doing Nothing

## Results in:

- Lost opportunities
- Weak AEP pipeline
- Playing catch-up in Q4

**Action now = Advantage later**



## You Don't Have to Do It All

- You *do* have to do **something**
  - Planned, repeatable outreach
  - No last-minute scrambling
- Pick **one focus**
- Commit to it
- Execute it

Progress beats being overwhelmed



# Call to Action

## **Pick Your Strategy Today**

- Go write business
- Go scale your team
- Go build partnerships

**But whatever you do — start now**





# You're **NOT** Alone

## ICBN Is Here to Help

- Schedule time with ICBN
- Bring a simple outline of your plan
- We'll help you refine and build it

Start where you are.

We'll help you move forward.



Scan QR code to schedule  
a meeting with Seth



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# Thank You!