

ICBN

NEXT  LEVEL

WHAT COMES NEXT:

Turn Reflections into Results

One Size Does **NOT** Fit All

Your Goals Should Be Unique

- Your pharmacy, patients, and community are different
- Your goals should reflect *your reality*

SMART GOALS

Specific: Well-defined, clear, and unambiguous

Measurable: With specific criteria that measure your progress toward the accomplishment of the goal

Achievable: Attainable and not impossible to achieve

Realistic: Within reach, realistic, and relevant to your purpose

Time-Bound: With a clearly defined timeline, including a starting date and a target date. The purpose is to create urgency.

ICBN – We Need Your Help

1. Double Agent Recruitment Pipeline

Build a consistent flow of high-quality, licensed agents by creating referral programs and attending 3-5 key Pharmacy tradeshow. Q1-Q3 2026.

2. Increase Agent MA/MAPD Productivity by 50%

Develop structured mentorship/shadowing program, roll play short, realistic scenarios, micro-goal setting session with follow-up to increase focus and comfort levels. Q2-Q4

3. Strengthen Carrier Relationships

Deepen direct partnerships with key Medicare Advantage, Supplement, and PDP carriers to secure better resources, co-op opportunities, and competitive product access for agents. Q1 – Q4

If you have any suggestions, on how we can improve the process for you. We're open to discussions!

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Practical, Personalized, and Actionable

First Goal: Set a Goal to Set a Goal

- Pause before you plan
- Intentional goal setting beats reactive goal setting
- Progress > perfection



Organize Before You Optimize

Create Categories to Frame Your Activities

- AEP Readiness
- Marketing & Outreach
- Automation & Systems
- Staffing & Support
- Patient Segmentation
- Plan Reviews (T65, DSNP, CSNP)



Focus Creates Momentum

Set 1–3 Meaningful Goals

Tie each goal to:

- A stress point
- An inefficiency
- A missed opportunity



It's Never Too Early...

AEP Planning Starts Now

- Don't wait until fall
- The best AEPs are built months in advance
- What you do *now* determines how smooth AEP feels later



AEP Reflection. Be Honest!!

Where Did You Feel It? Ask yourself:

- Where were you efficient during AEP?
- Where were you stressed?
- What specifically caused that stress?
- Was it people, process, volume, or timing?

Stress is data. Use it.



From Stress to Solutions

Create a running list:

- What broke down?
- What slowed you down?
- What depended too heavily on *you*?
- What would you never want to repeat?

This list becomes your roadmap for change



Capacity Is Strategy

Do You Need Help? Consider:

- Do you need a second agent?
- Could a spouse or relative help seasonally?
- Can a technician be trained to assist?
- What tasks *must* be done by you vs. delegated?

Goal example:

- Identify one role to offload before next AEP



Goal Areas...

Reduce Manual Work... **Automation**

- Birthday outreach automation (ThankAfter)
- Letters, cards, calls (Sly Broadcast)
- Systems that run even when you're busy

Know Your Database... **Identify Who's Who**

Add PMS Flags:

- Aging into Medicare (Turning 65)
- LIS / Extra Help
- Medi-Medi
- Poorly reimbursing plans



T65s... From Data to Action

Work Backwards

- Identify patients turning 65 in the next 3, 6, 9, 12, and 18-months
- Develop outreach campaign... **Automate it**
 - Message for 18-months ahead of birthday
 - Message for 12-months ahead of birthday
 - Educate them on Medicare 6 months ahead of birthday
 - 3-months ahead of birthday, Needs Assessment & enrollment in Medicare plan
- Add PMS notes: *"Talk to a broker"*
- In-pharmacy signage

D-SNP... From Data to Action

Work Backwards

- Identify eligible patients
- Review current coverage
- Offer appropriate plan reviews
- Add PMS note: *“Talk to a broker”*

ICBN Challenge — Schedule lunch with your Broker Manager
before the end of February

They know:

- Local DSNP nuances
- Enrollment rules
- Which plans perform best

C-SNP... From Data to Action

Repeat the Process; Different Needs, Same Discipline

- Review patient base
- Identify chronic conditions
- Match with appropriate CSNPs

ICBN Challenge — Schedule lunch with your Broker Manager
before the end of March

They know:

- Local CSNP nuances
- Enrollment rules
- Which plans perform best

Build Strategic Partnerships

You Already Know More People Than You Think

- Make a list of:
- Prescribers
- Chiropractors
- Dentists
- Home care providers
- Community organizations

These relationships are underutilized assets.



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

Turn Your Pain Points into Wins

Don't Forget the "Problem Children"

- Identify poor reimbursing plans
- Invite patients in for review
- Present alternatives when appropriate



Consistency Before Complexity

Document and Track Results. If It's Not Noted, It Didn't Happen

PMS notes:

- “Plan review offered”
- “Referred to broker”
- “Follow-up scheduled”



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





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.



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Thank You!