

# ICBN

NEXT  LEVEL

WHAT COMES NEXT:

**Scale Smarter • Lighten Your Load**

# You're Wearing Too Many Hats

## You are:

- Medicare agent
- Pharmacy operator
- Marketer
- Admin
- Customer service
- Compliance monitor

## The Result:

- Long days
- Reactive work
- Burnout
- Missed revenue opportunities
- Underutilized data
- Marketing done when there's time

Most owner-operators are stuck *in* the business instead of *on* the business.



# Key Promises

- Write more Medicare business
- Reduce owner workload by 10–20+ hours/week
- Improve patient & client experience
- Build a repeatable, sellable operation



# The Hidden Cost

## of doing Everything Yourself

### Time Drain Examples:

- Patient list cleanup & segmentation: 4–6 hrs./week
- Marketing follow-ups & reminders: 3–5 hrs./week
- Documentation & admin tasks: 5–10 hrs./week
- Missed calls & delayed responses = lost enrollments

### Real Cost:

- 15–25 hours/week of *low-leverage work*
- That's **60–100 hours/month**

Your highest value is selling, advising, and relationship building — not administrative work.

Turn chaos into systems. Turn staff into revenue multipliers.

# The Big Shift — The Force Multiplier

## **Add One Strategic Team Member**

- This is not a licensed agent (yet)
- This is a Medicare Operations & Growth Support Role / A Revenue Support Specialist

## **Purpose:**

- Offload admin & operational work; tasks that don't require a licensed agent *but directly drive Medicare growth.*
- Prepare your business to scale

## **This person becomes the engine behind:**

- Organization
- Outreach
- Follow-ups
- Marketing execution
- Data segmentation

# Organize To Optimize

## What This Role Actually Does / Core Responsibilities:

- Segment patient/member lists:
  - Turning pharmacy data into Medicare opportunities
- Manage marketing communications:
  - Email, SMS, mail prep
  - Appointment reminders
- CRM management:
  - Data entry, tagging, follow-ups
- AEP & SEP prep:
  - Outreach scheduling
- Internal coordination:
  - Tracking leads, referrals, renewals

**They support sales — They don't replace you.**

# Benefits *Abound*

## To the Pharmacy:

- Turns data into actionable revenue opportunities
- Increased foot traffic
- Stronger patient loyalty
- Higher script retention
- Better adherence outcomes
- **Pharmacy becomes a growth engine, not just a dispensing operation**

## To the Medicare Agency:

- Proactive outreach; More leads
- Better appointment prep = higher close rate
- Cleaner lists = higher conversion rates
- Faster follow-up = fewer lost leads
- SEP triggers identified earlier
- **Adds scalability to Agency;** Agent can handle 30–50% more clients without burnout

## Benefits **Abound**

### To Patients/Clients:

- Proactive outreach
- Better plan alignment
- Fewer missed benefits or coverage surprises
- Trusted local guidance; feels personal, not transactional
- Less missed calls & faster callbacks
- **Patients don't just stay for price; they stay for the clarity and trust**

### To the Owner:

- Refocus energy on Growth Strategy & Partnerships
- Documented workflows; repeatable systems
- Increased revenue
- Business continuity and growth without reliance on PBM revenue
- **Owners don't just survive on margins; they grow through systems, strategy, and control**



# Benefits **Abound**

## To Staff:

- Less pressure to “answer insurance questions”
- Clear handoffs to insurance support staff
- Front-end staff focus on service
- Defines and clarifies roles
- Career growth path
- **Outcome: Lower turnover & better patient interactions**



# **A** Secret Weapon

## **A Virtual Assistant (VAs) Can Handle:**

- Inbound/outbound calls
- Appointment confirmations
- Follow-ups
- Email/text campaigns

## **Unique Growth Ideas Using VAs:**

- Schedule annual “Medicare Check-In” calls
- Birthday + benefit reminder campaigns
- Turning 65 education drip campaigns
- AEP overflow call handling



# Medicare = Growth Engine

**You don't need to work harder — you need leverage**

Adding one strategic staff member can:

- Multiply Medicare production
- Improve patient care
- Protect your time
- Future-proof your pharmacy business



# Investment vs. Expense Mindset

## Mindset Shift:

- You're not "adding payroll"
- You're buying:
  - Time
  - Focus
  - Growth capacity

**Businesses don't scale on hustle alone  
— they scale on systems and people.**



## **3** Action Steps

1. List the **top 5 tasks** you shouldn't be doing
2. Decide: Part-time, full-time, virtual assistant
3. Commit to a **90-day test period**

**Worst case:** You gain clarity

**Best case:** You unlock your next growth phase



# Final Thoughts

## ***You Don't Need to Work Harder — You Need Help***

- Schedule a staffing strategy call
- Download sample job description
- Get a 30-60-90-day onboarding checklist



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# Thank You!

# The Hidden Cost of Doing It All By Yourself

## Lost Revenue due to the Bottleneck

Missed MA Enrollments	Annual Volume	Lost Year-1 Revenue
1 per month	12	\$8,328
2 per month	24	\$16,656
3 per month	36	\$24,984

- *Based on 2026 CMS MA commission: \$694 per new enrollment; Year 1 Only.*
- *Excludes Switches, Renewals, and Auxiliary sales*
  - Renewal/Switch commission: \$347 per year
  - Avg client lifespan: 3–5 years; Lifetime renewal value per missed client:
    - 3 years: \$1,041    5 years: \$1,735
  - 👉 36 missed enrollments = \$37,476–\$62,460 in lost renewals
- *Excludes positive shift in average reimbursement per prescription*
- *Excludes new sales from OTC benefit card usage in pharmacy*

**Did You Know...**

AEP = 8-10 Weeks

- Miss 1 enrollment/week = 8-10 clients
- Year-1 loss: \$2,776-3,470
- 3-5-year renewal loss: \$8,328-\$17,350
- One busy AEP can quietly cost \$15-20K+



## Hire Staff vs. Stay Solo: The Real ROI

### Stay Solo

- Owner handles admin + sales
- Missed calls & follow-ups
- Limited AEP capacity
- Reactive marketing
- Financial Impact (Annual)
- Missed enrollments: 2/month (24/year)
- Year-1 commission loss:  $24 \times \$694 = \$16,656$
- Renewal loss (3–5 yrs):  $\$24,984 - \$41,640$
- Total lost value:  $\$41,640 - \$58,296$
- ✗ Owner works more
- ✗ Growth capped
- ✗ Burnout risk

### Hire Staff / VA

- Admin & outreach delegated
- Consistent follow-up
- Organized AEP pipeline
- Proactive marketing
- Annual Investment cost:  $\$14,400 - \$19,200$
- Revenue Gained
- Recovered enrollments: 2+/month
- Year-1 revenue recovered:  $\$16,656$
- Renewal value protected:  $\$24,984 - \$41,640$
- ✓ Owner time freed (10–20 hrs/week)
- ✓ Predictable growth
- ✓ Scalable model

**This isn't about adding payroll  
— it's about stopping revenue leakage.**

# Organize To Optimize (Tasks)

## 1. Patient & Client List Segmentation

- Age 60–64 (future Medicare)
- Current MAPD/PDP clients
- LIS/Extra Help eligible
- Chronic condition groups
- High negative reimbursements

## 2. Marketing Communications

- Email campaigns
- Text reminders
- Mailer coordination
- Event invites (seminars, AEP, vaccines)

## 3. Medicare Workflow Support

- Appointment scheduling
- CRM updates
- Follow-up reminders
- Renewal tracking

## 4. Pharmacy–Insurance Bridge

- Identify patients picking up meds who need reviews
- Flag eligibility opportunities
- Coordinate warm handoffs to agent