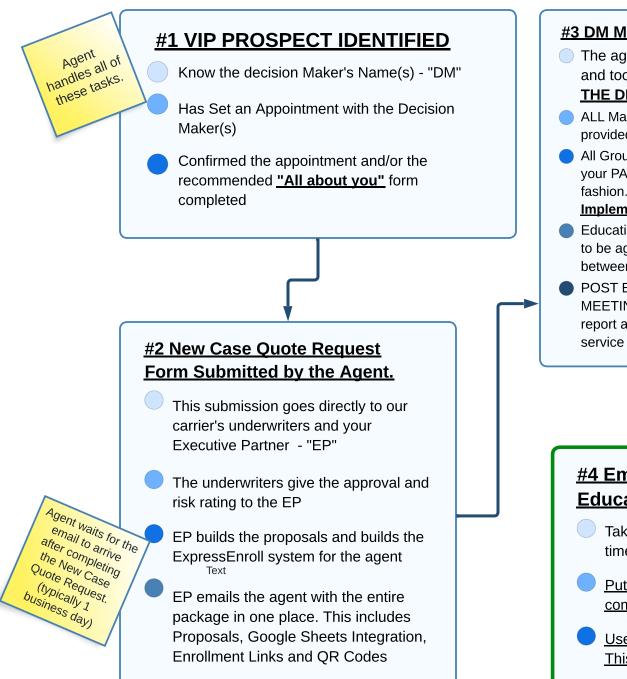
VIP GROUP IMPLEMENTATION ROADMAP to SUCCESS



#3 DM MEETING IS RUN BY THE AGENT

- The agent uses all tools provided by their EP and tools in their PARTNER APP to CLOSE THE DEAL.
- ALL Master Applications are to be completed (All is provided in your PARTNER APP)
- All Group implementation steps are to be followed in your PARTNER APP in order and in a timely fashion. (This includes Case Setup Forms and Implementation notices to all carriers)
- Education and Enrollment Dates and Methods are to be agreed upon and ALL logistics confirmed between the agent and DM.
- POST ENROLLMENT FOLLOW-UP MEETING/CALL is scheduled to review deduction report and ensure smooth deductions and future service calls

Agent

handles all

of these

tasks.

<u>#4 Employee</u> **Education/Enrollment Time!**

- Take advantage of technology to save time! (QR Codes/TextMagic, etc)
- Put a DEADLINE on enrollment completion dates
- Use due diligence and SERVE people. This is where the money is made.

#5 TELL YOUR ENROLLMENT DIRECTOR when Your Enrollment is complete.

Your ED will input all of your client data into our VB worksite carrier systems, create deduction reports, and even handle the transmittals for you!

This is for Worksite VB only.

Dental, Vision,

and other carriers apply to

the agent

Agent handles all

of these

tasks.

- They will effectively communicate processes with you and carrier issuance departments on your behalf.
- They will ensure that EDI carrier feeds will be in place weekly for when you have new hires, qualifying changes, and terminations.
- They will provide to you system and payroll deduction reports to give to the employer.

#6 Circle of Success

- Follow up WITHIN a WEEK to ensure deductions are handled.
- Set up QUARTERLY service calls in YOUR calendar along with scheduling NEXT YEAR's **Open Enrollment.**
- ASK FOR 2 REFERRALS!