VIP GROUP IMPLEMENTATION ROADMAP to SUCCESS

Agent handles all of these tasks.

#1 VIP PROSPECT IDENTIFIED

- Know the decision Maker's Name(s) - "DM"
- Has Set an Appointment with the Decision Maker(s)
- Confirmed the appointment and/or the recommended **"All about you"** form completed

#2 New Case Quote Request Form Submitted by the Agent.

Agent waits for the email to arrive after completing the New Case Quote Request. (typically 1 business day)

- This submission goes directly to our carrier's underwriters and your Executive Partner - "EP"
- The underwriters give the approval and risk rating to the EP
- EP builds the proposals and builds the ExpressEnroll system for the agent
- EP emails the agent with the entire package in one place. This includes Proposals, Google Sheets Integration, Enrollment Links and QR Codes

Text

#3 DM MEETING IS RUN BY THE AGENT

Agent handles all of these tasks.

- 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

#4 Employee 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.

This is for Worksite VB only. Dental, Vision, and other carriers apply to the agent

- 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!
- 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

Agent handles all of these tasks.

- 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!