

STEPS TO LOYALTY SUCCESS: AFTER THE SALE

A summary of strategies and tools to help you drive growth through member loyalty.



Loyalty is the key to growing your business.

To succeed, you need to build loyalty with current members so they refer you to their family and friends. To help you do that, we've created this short guide to achieving loyalty success. It offers strategies, tips and tricks for generating the kind of loyalty that can help you meet — and exceed — your sales goals.

To build loyalty, you should plan on reaching out to members two to four times a year. An important measure of member loyalty is the Net Promoter Score® (NPS®). You can learn more about NPS on the back of this handout.

Opportunities to build loyalty.

1 Enrollment Experience

The headwaters of loyalty. The steps you take to ensure a good plan fit lay the foundation for a positive experience.

2 Solid Start: First 90 Days

Stay in touch during the first 90 days after coverage begins so you can provide timely assistance.

3 Mid-year Check-in

Stay top of mind with members so you can build trust and make it more difficult for competitors to get their attention.

4 Staying With the Plan

Reach out to members during AEP to review plan changes and make sure members still have the best plan for their needs.

1

Enrollment Experience

Help ensure the right plan fit at the point of sale.

- Discuss member's needs, review and consider all appropriate options in the Medicare Solutions portfolio. Make sure they have a clear understanding of their plan options, costs and coverage

2

Solid Start: First 90 Days

Show your support early and help ensure a smooth start.

- Thank you cards
- Contact info flyer and magnet
- Relationship letters
- Greeting cards
- Member orientation meeting



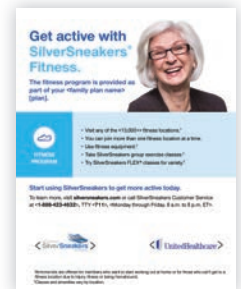
Member Orientation Presentation



Contact Info Magnet



Greeting Card



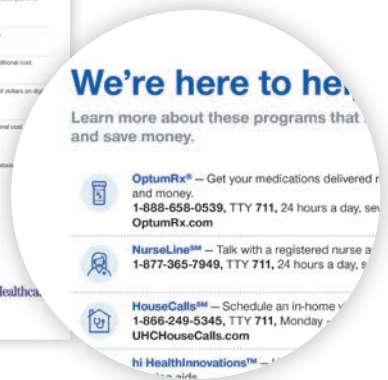
Member Handout



Here For You Relationship Letter



Contact Info Flyer



with members two to four times a year.

3

Mid-year Check-in

Stay in touch throughout the year.

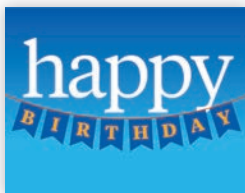
- Relationship letters
- Newsletters
- Greeting cards
- Program flyers
- Call conversation outlines

4

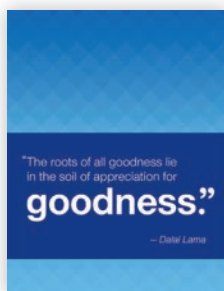
Staying With the Plan

Reach out during AEP.

- Contact information and refer a friend letters
- For Medicare Advantage members, use the pre-Annual Notice of Change (ANOC) letter and presentation



Birthday Card



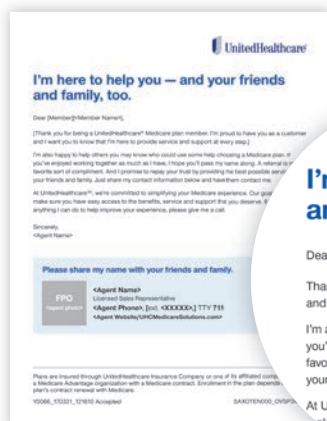
Thank You Card



Thank You Card*



Holiday Card*



Referral Letter



Newsletter

*For use with MedSupp Members only.

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ADDITIONAL MATERIAL

Loyalty Planning Worksheet

UnitedHealthcare

Loyalty Planning Worksheet

Agent Name: _____ Member Profile: _____ Plan Details: _____

Plan Start Date: _____ Plan End Date: _____

Loyalty Initiatives

Use this worksheet to outline the steps you'll take to start building member loyalty. Define initiatives and time commitments to success.

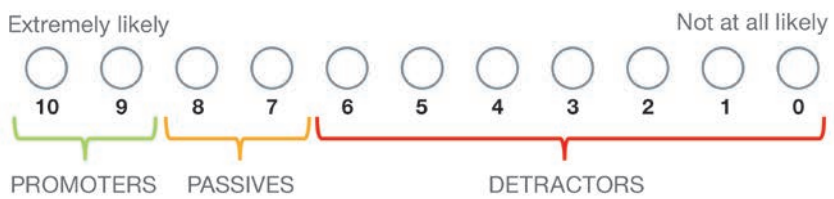
Q1	Initiative	Time Commitment to Success
Q2	Initiative	Time Commitment to Success
Q3	Initiative	Time Commitment to Success
Q4	Initiative	Time Commitment to Success

Use this worksheet to outline the steps you'll take to start building member loyalty.

The Ultimate Question: Net Promoter Score (NPS)

- The NPS is generated by taking the percentage of customers who rate their plan the most highly (promoters) and subtracting those who give it the lowest ratings (detractors)
- NPS is measured on a monthly basis throughout the plan year
- UnitedHealthcare® is committed to using NPS to improve the quality of the experience and measure member loyalty

How likely are you to recommend us to a friend or colleague?



$$\text{Net Promoter Score} = \% \text{ Promoters} - \% \text{ Detractors}$$

The UnitedHealthcare Toolkit

All of the materials included here can be found online in the UnitedHealthcare Toolkit. To access these materials in the toolkit, go to:



<https://www.uhcjarvis.com> > Sales & Marketing Tools > Launch Agent Toolkit

Toolkit Customer Service



1-877-249-5419



customerservice@uhcagenttoolkit.com