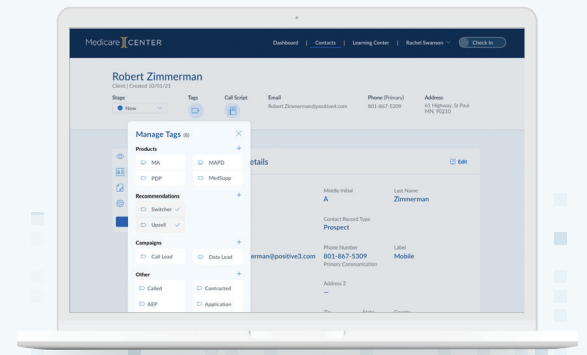


# MedicareCENTER CRM Tags are powerful and easy to use!

Custom and auto-assigned CRM Tags can help you be more efficient!



Did you know CRM Tags in MedicareCENTER can help you easily prioritize the actions you take with your clients?

Here's how to use this powerful feature:

- Open a Contact record, then click **"Tags"** to view available Tags.
- Add your own by clicking **"Create Tag"** at the bottom of the list.
  - » Creating a custom Tag for new enrollees such as "Welcome 2023" can help remind you to follow-up after the enrollment period and serve your clients better.
- MedicareCENTER automatically assigns several Tags, including:
  - » SEP — Special Enrollment Period, for those in areas affected by natural disasters
  - » Switcher — clients who may be likely to change plans
  - » Cross-Sell — clients might need additional products
- Use the "Filter" button to then select and filter down to a list of Contacts who have been assigned the selected Tag

CRM Tags make it simple to build your business by knowing which clients to contact — and when! The best part, they're available for FREE on MedicareCENTER.com and the MedicareCENTER Mobile App.

Log in today to use the powerful solutions available in MedicareCENTER!

