

# RETENTION PLANNING

WORKSHEET



# RETENTION INITIATIVES

## EXAMPLE



Here's an example of a quarterly client retention plan. Make sure to include both the initiative and the potential obstacles, plus available resources to succeed and a due date. Use the following pages to capture your own plan, quarter by quarter.

Initiative	Obstacles	Plan/Resources	Due Date
Connect with clients who qualify for OEP	Schedule time, don't get behind!	<ul style="list-style-type: none"> <li>Plan for OEP requests for plan changes</li> </ul>	
Relationship letters (e.g., Here for You, Referral, Thank You card)	Designing a letter/mailer	<ul style="list-style-type: none"> <li>Schedule calendar for social communication (mail, phone contact and digital) <ul style="list-style-type: none"> <li>Birthday cards, seasonal cards, thank you cards, touch-base phone calls (do they have their Medicare ID card? Signed into Member Portal?)</li> <li>Send Referral letter (Relationship Letter series)</li> </ul> </li> </ul>	
Check in with your clients to ensure they understand how to use their plan	Stay organized with your time!	<ul style="list-style-type: none"> <li>Calendar time daily for service support, follow up with clients</li> <li>Schedule outreach related to Ancillary benefits or preventative/wellness benefits (e.g., OTC/food, vision, hearing, dental)</li> </ul>	

# RETENTION INITIATIVES

## EXAMPLE



Here's an example of a full year's client retention initiative. Once you've created your quarterly goals, you can create a single page overview like this.

### Q1 Jan - Mar

- Connect with clients who qualify for OEP
- Relationship letters (e.g., Here for You, Referral, Thank You card)
- Check-in with your clients to ensure they understand how to use their plan

### Q2 April - June

- Outreach to DSNP and LIS members
- "Checking in" outreach (e.g., birthdays/life events)

### Q3 July - Sept

- Outreach to clients in coverage gap or catastrophic drug stage
- Outreach to DSNP and LIS members
- Plan client meetings
- Plan AEP sales/marketing community meetings

### Q4 Oct - Dec

- Send current client meeting invites
- Send community meeting invites
- Schedule AEP timeline reminders on social media



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List your own initiatives you will implement this quarter to improve client retention. Include potential obstacles, plan details with resources and your due date.

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# POTENTIAL OBSTACLES



Take a closer look at the obstacles you listed on the previous page. List each initiative, the obstacles and the potential solutions you can implement for each obstacle.

Initiative	Obstacles	Solutions



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