

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"> Plan for OEP requests for plan changes 	
Relationship letters (e.g., Here for You, Referral, Thank You card)	Designing a letter/mailer	<ul style="list-style-type: none"> Schedule calendar for social communication (mail, phone contact and digital) <ul style="list-style-type: none"> - Birthday cards, seasonal cards, thank you cards, touch-base phone calls (do they have their Medicare ID card? Signed into Member Portal?) - Send Referral letter (Relationship Letter series) 	
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"> Calendar time daily for service support, follow up with clients Schedule outreach related to Ancillary benefits or preventative/wellness benefits (e.g., OTC/food, vision, hearing, dental) 	



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.



- 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



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



- 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



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



RETENTION INITIATIVES



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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