

Halftime for AEP! Making Adjustments Using Data

Presented By:

Austin Ifedirah, MBA, DDS, *Managing Partner* – **Engagent Health**





THE RISE
ASSOCIATION

We are a network of health care professionals addressing the challenges posed by the emerging landscape of value-based care and government health care reform.

OUR MISSION

Our mission is to provide a community for like-minded professionals to come together for networking, education, and industry collaboration to stay ahead and advance their careers.

ONE ASSOCIATION
THREE COMMUNITIES



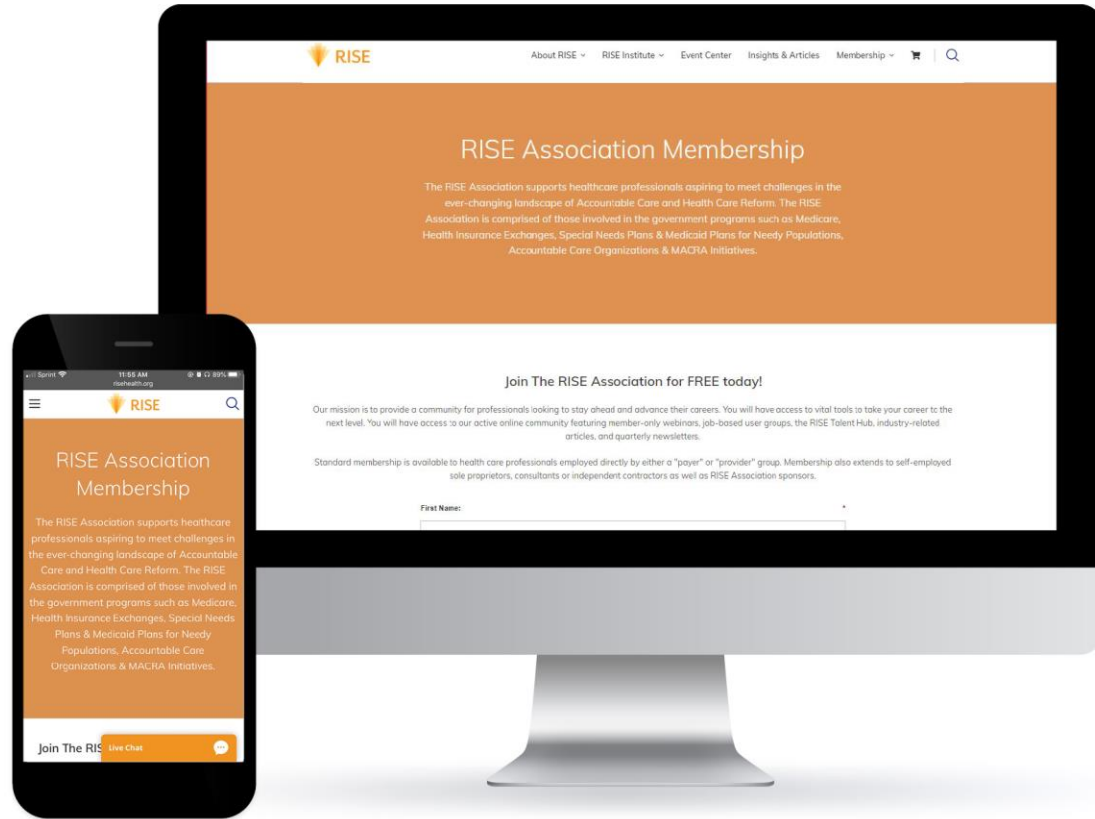
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ENGAGENT HEALTH

HALFTIME FOR AEP!

MAKING ADJUSTMENTS USING DATA

AUSTIN IFEDIRAH, ENGAGENT HEALTH



YOUR PRESENTER



Austin Ifedirah

FOUNDER AND MANAGING PARTNER



About

ENGAGENT HEALTH



Established in 2018



Headquartered

Plantation, Florida



Ops Centers

Plantation, FL
Winter Park, FL
Santo Domingo, DR
Santiago, DR



200+ Employees



Unified solutions for sales agents, agencies and health plans in the government payer space. Our unified platform streamlines the sales process for your internal and external sales agents.

- > Agent onboarding, CRM, commission and agent-oversight modules provide a single resource for all member acquisition initiatives.

About

ENGAGENT HEALTH



Software

Provide a native, single platform view for all sales backend functions. Modules include:

- > Agent Onboarding and Training
- > Agent Oversight
- > CRM
 - > Lead & Campaign Management
 - > Enrollment Center
 - > Benefits Compare
- > Commissions & Incentives Payment

AGENCY SERVICES

- > FMO
- > Contact Center (*Licensed Agents*)

BPO SERVICES

- > Contact Center



MA

ENROLLMENT PERIODS

Enrollment Periods	Date Range	Notes
Annual Enrollment Period (AEP)	10/15 – 12/07	70% of sales
Open Enrollment Period	01/01 – 03/31	Plan to plan
Special Enrollment Period	01/01 – 09/31	Needs special circumstances
Annual 5 Star MA Plan Enrollment Period	12/08 – 11/13	Highest quality plans only

Overview Of AEP



Occurs every year 10/1 – 12/7



Application receipt begins 10/15



Outsized impact on annual sales target



Rest of plan year mostly spent evaluating previous AEP or preparing for upcoming AEP

Benchmarking & Goals for AEP



AEP Debrief

- > Actual to target sales
- > Channel rationalization and evaluation
- > Benefits review (what worked, what did not)
- > Technology and infrastructure performance
- > Other barriers to growth encountered
- > Relationships

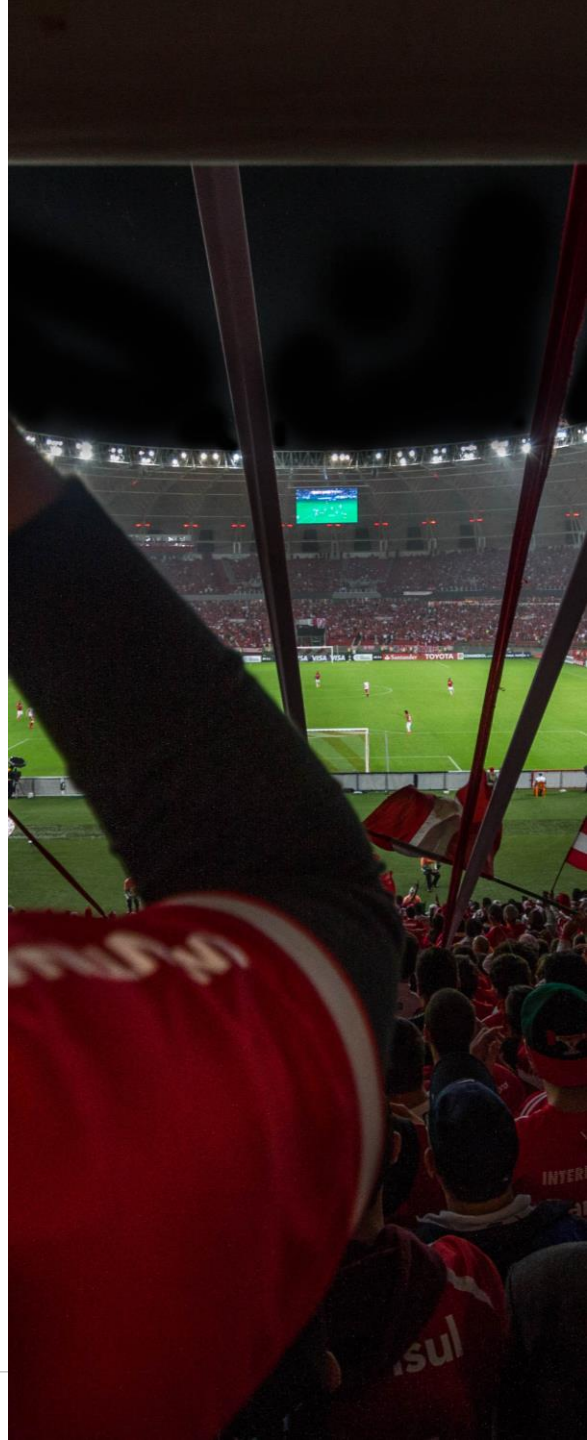
Level Up AEP Sales If There Is A Shortfall

- > Calculate sales growth by member months (not membership) to meet year-end revenue goals

Achieve Budgeted Lockin Sales

- > Sales by channel
- > Marketing & outreach
- > Other lead generation activities

Benchmarking & Goals for SEP



Retain Existing Members Utilizing Year-round Retention Campaigns

- > Calendar view of membership,
- > Also helps care management and stars

Preparations for upcoming AEP (establish a multidisciplinary team to quarterback AEP readiness)

- > Bid submission and approval
- > Budgeting
- > Marketing & outreach
- > Materials planning
- > Required materials
- > Collaterals

Benchmarking & Goals for Mid-AEP



Mid-AEP – Gauge Progress

- › Are your AEP strategies delivering the results you were looking for?

Re-evaluate AEP Strategies

- › Utilize data to identify areas of success and opportunity.
- › Pinpoint areas needing improvement and get insight on areas to refocus efforts.
- › Where are your sales coming from?
- › Which agents have the highest and lowest performance
- › Which products are getting the most attention?
- › Which regions of your market are experiencing the most traction?

Finish the AEP Season Strong

- › Data can be utilized to pinpoint areas needing improvement and lend insight on areas to refocus efforts.



Mid-AEP 2020

NOVEMBER



Review Of Marketing Performance By Media



Review Of Sales Performance By Channel



Meetings With Sales Channels



Review Of Membership And Goals



Review Of Market



Review Of Internal Processes And Resources



Cost-Per-Lead



Cost-Per-Acquisition



Conversion Rate



Mid-AEP 2020

NOVEMBER



Review Of Marketing Performance By Media



Review Of Sales Performance By Channel



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Review Of Membership And Goals



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Review Of Internal Processes And Resources



Conversion Rate



Cost-Per-Acquisition



Modality (Seminars, IHA, Online)



Mid-AEP 2020

NOVEMBER



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Review Of Internal Processes And Resources



Captive Feedback Meetings



FMO touch-bases



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Review Of Internal Processes And Resources



Geography



Provider Distribution



Plan Distribution



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NOVEMBER



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Review Of Sales Performance By Channel



Meetings With Sales Channels



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Review Of Market



Review Of Internal Processes And Resources



Market Changes



Winning Carriers



Winning Plans By Geography



Benefit Trends



Mid-AEP 2020

NOVEMBER



Review Of Marketing Performance By Media



Review Of Sales Performance By Channel



Meetings With Sales Channels



Review Of Membership And Goals



Review Of Market



Review Of Internal Processes And Resources



Review The Efficiency And Productivity Of The Marketing Review Process



Review Of Lead Distribution Process



Identified Resource Needs



Identified Technology And Analytics Needs





Key Takeaways And Best Practices

- › AEP marketing is a great way to achieve and exceed membership and revenue goals
- › Primary goals of the season should go beyond member acquisition to include relationship building within the community
- › “Quiet” season is a great time to experiment with new approaches for how sales can add value to plan quality and operational metrics
- › Define and act on technology and other infrastructure needs
- › Prospect acquisition should be iterative, ongoing and multi channel
- › Refine your channels Mid-AEP. Don’t wait till after AEP

Thank You!

Austin Ifedirah

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