After the Insurance Sale: Client Follow-Up Basics

The Enrollment is Submitted. Now What?

The job is not done. Follow-up turns a one-time enrollment into a long-term client relationship.

The Post-Enrollment Anxiety Gap

Once you leave, doubt creeps in:

- Did I pick the right plan?
- When does it start?
- What happens to my old coverage?

Proactive vs. Reactive Support

Without Follow-Up

- Client calls the carrier directly
- Gets confused by general support
- Potentially undoes the enrollment

With Follow-Up

- Reassures the client
- Positions you as the primary contact
- Protects the enrollment

The Client Retention Timeline

Three strategic touchthree strategic touchpoints.

1 Immediate: 24-48 Hours

2 Post-Effective: 1-2 Weeks

3 Annual Review: 60-90 Days Pre-AEP

Touchpoint 1: The Reassurance Message

Timing: 24 to 48 hours post-enrollment

The Message:

- Thank them for their time
- Note that the application is submitted
- Confirm when coverage starts
- Offer availability for questions

Touchpoint 2: The Efficacy Check

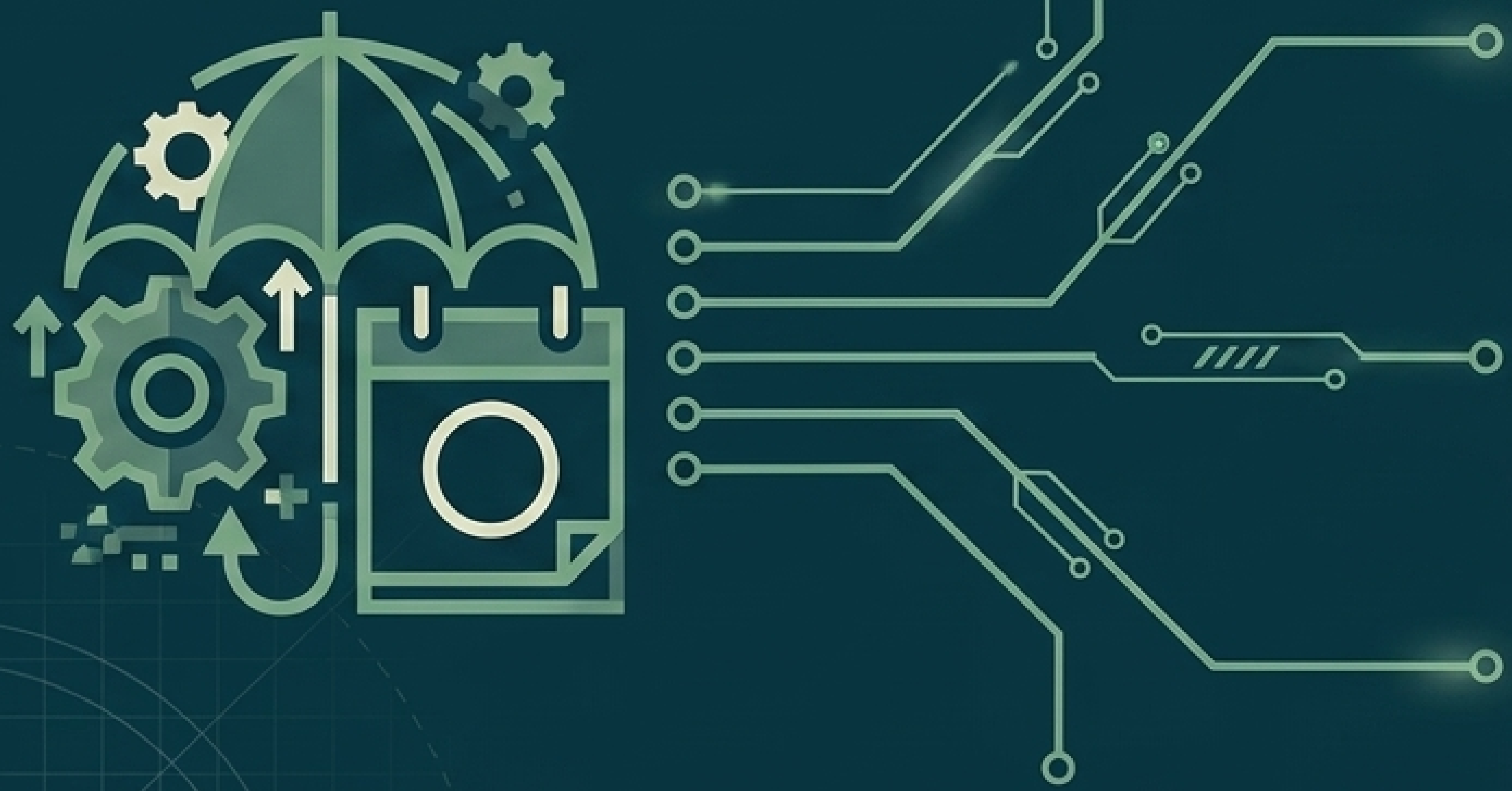
Timing: 1 to 2 weeks after effective date

Check for Smooth Processing:

1. Did the new insurance card arrive?
2. Are doctors processing claims smoothly?
3. Is the pharmacy running the correct plan?

Touchpoint 3: The Annual Review

Timing: 60 to 90 days before AEP



Why Reach Out **Early**?

- Plans, networks, and formularies change yearly
- Proves the client is taken care of
- Prevents competitors from poaching at community events

The Core Habit: Log Every Interaction

A system beats a good memory.

Record in your CRM or Spreadsheet:

- The date of interaction
- What was discussed
- The next step

The Loyalty Multiplier

Referencing a specific detail six months later proves you are paying attention.

That builds a book of business that stays with you year after year.

Build Your Follow-Up Template

Implement this starting with your very next enrollment.

- ☑ 1. Thank-You Message (48 hrs)
- ☑ 2. Card Check-In (1-2 weeks post-effective)
- ☑ 3. AEP Reminder (60 days pre-AEP)