

Sales Meeting Job Aid



1. Welcome (5 minutes):

Agent Introduction

Name /Title /Company you represent / product & plan being covered.

Meeting Overview:

- Plan benefits - enrollment
- Remember to mention the Medicare Shoppers Guide. This is a great resource and consumers can keep it
- Make sure to cover housekeeping items

Tips & Reminders!

- Welcome consumers as they enter the venue
- Share how long you've been selling ATRIO
- Introduce other agents who might be assisting you
- Collect lead cards
- Ask for information in advance to look-up (Dr., Rx, Current plan)

2. Why ATRIO Health Plans, Medicare 101 & Prescription Drug Coverage (15 minutes):

Use this time to talk about why a consumer should enroll with ATRIO Health Plans. What differentiates ATRIO as a company, our products and what differentiates you as an agent?

- *ATRIO is one of Oregon's fastest growing Medicare Advantage plans. Choose the local plan that's been serving Oregon residents for over 20 years.*
- *ATRIO Health Plans has provided, high quality, and truly local Medicare Advantage coverage to tens of thousands of your neighbors across Oregon.*
- *ATRIO plans deliver features and benefits that include, specially chosen provider partners to give you the care you deserve. Flexibility - our Medicare plans have both in-network and out-of-network benefits. Great benefits and plans that meet your needs. Benefits that travel with you - see a provider anywhere in the U.S. who accepts Medicare and use your ATRIO benefits.*
- *ATRIO plans include all benefits that Medicare offers, plus extra benefits like, Vision, Meals, Transportation, Wearable Medical Devices, Healthy Rewards. Each plan includes a Flex Card with allowances to use toward, Dental, Fitness Coverage, Over The Counter (OTC), and Alternative Therapies such as routine Chiropractic, Acupuncture and Naturopathy services.*

Let your audience know you are going to review and explain the basics of Medicare and Prescription Drug Coverage and how Medicare Advantage from ATRIO can help get more for their Medicare dollar.

- *Recap: "As you see, traditional Medicare Parts A and B do not cover everything. That is why ATRIO Health Plans offers multiple plan types from which you can chose from."*



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3. Cover Plan Benefits (20-30 Minutes):

- Use Enrollment Guide / Benefits at a Glance sheets (BAAGs) to cover plans in market.
- Highlight the differentiators ATRIO offers members
- Share what's great about the plans in the area. Consider sharing a story that shows how ATRIO has been the right choice for members.

Below are additional supplemental benefits that may be important to your audience. Use the list to decide what you want to share in your meeting.

- PPO Flexibility
- \$0 Monthly Plan Premium
- \$0 PCP Copay
- \$0 Medical & Rx Deductible on most plans
- \$0 copay on Tier 1 & Tier 6
- Cashback giveback on most plans
- Flex Card
- Worldwide Coverage
- Meal Benefits
- Transportation
- Vision & Hearing Exams
- Wearable Medical Alert System (PERS)
- Dental Coverage
- Fitness
- Over-the-counter benefit
- Alternative Therapies such as routine Chiropractic, Acupuncture, and Naturopathy services

4. Wrap up & Enrollment:

- Tell the audience you have completed the formal presentation and walk them through the enrollment kit, application process and what to expect after enrollment.
- Offer to set up a future appointment for those not able to enroll today!
- **Remember your compliance requirements** at the time of enrollment - thorough needs analysis, Star Ratings, and plan name!

Consider tips from successful agents!

"I set the lead card on top of the other documents when setting up the meeting space... I include my business card and ATRIO pen! Often consumers will fill it out right away!"

"I always use enrollment language throughout the meeting. I'll say things like...'When you enroll today...' and 'When this plan is effective for you on January 1st, you'll be able to access...' and 'Now is when you enroll, and I get to become your ATRIO Health Plans agent.'"

"I don't call it a lead card - I call it my promise card. When a consumer fills it out, they have my word that I will get back to them within 48 hours!"

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