

CONNECTING WITH MEMBERS

A good relationship with your client is an agent's best asset. Strengthen that relationship by contacting new members in the first 30, 60 and 90 days from enrollment. This outreach guide can help.

THE FIRST 30 DAYS

Call your new enrollees within the first 10–15 days and welcome them to their new CareFirst BlueCross BlueShield (CareFirst) plan.

- Make sure they've received their ID card, Flex Card (DualPrime only) and welcome packet.
- Ask if they need any assistance with transportation, scheduling doctor's appointments, filling prescriptions, activating their Flex Card (DualPrime only) or other issues.
- Always tell them when their plan begins. Follow up with a phone call to make sure everything's going well. Again, ask if they have any questions regarding their plan. Remind them of what their benefits are and how to use them.

MONTH 2 (60 DAYS IN THE PLAN)

Check in again with a phone call.

- Start the conversation by discussing extra benefits and services.
- Let the member know it's CareFirst's mission to help them achieve their best health by delivering healthcare that fits their needs.
- Their plans include added benefits at no cost, including dental, vision, transportation, Flex Card (DualPrime only) and more.
- Encourage members to take advantage of these benefits.

MONTH 3 (90 DAYS IN THE PLAN)

Make one more call within the first 90 days of their enrollment.

- Be sure to explain the importance of using the plan's in-network providers and assigned case managers.
- Encourage them to schedule regular wellness exams and screenings, fill out Health Risk Assessment forms and keep their provider involved in their long-term health.
- Remind them how to contact member services for assistance.

MEMBER RETENTION IS A YEAR-ROUND COMMITMENT

- The key to retaining members is never losing touch with them.
- The more value you add to member relationships, the more it helps your business.
- The more engaged a member is, the happier they are—and the more likely you are to retain them.



Always ask for referrals and leave a business card!