Systems & Tools

How to effectively use your resources

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Introduction

In addition to knowing how to sell and connect with your clients, you'll need to know how to effectively use the resources available to you and understand what they are for.

This guide is largely informational and will include descriptions and breakdowns of the platforms, and at the end there will be a link to a presentation which will include screenshots and videos so you can visualize the steps.

These are of course not the only tools available for you but these are the ones you'll be using most frequently, on almost a daily basis.

Section 1: Broker Link

Once you have completed your licensing and onboarding process, it's time to learn the systems you'll be using consistently! First, is Broker Link, which is the website managed by The Brokerage Inc.

Link Address: https://thebrokerageinc.com/

- Click "Get Started" → Select "I want to sign up for the Broker Link Portal."
- After the request is submitted, someone from The Brokerage Inc. team will approve it. This can take 24-48 hours.

What it's used for

- View & request contracts
- View production & your commissions through *AgentVizion*
- Submit Brokerage Bucks reimbursements
- Access a wide variety of pre-approved marketing materials
- Access training resources
- Obtain discounts & reimbursements for certain licenses & softwares
- Application submission through Simply Enroll

Details

Contracting

In order to sell for any carrier, you need to be contracted. This means you completed an application to sell on their behalf, which the carrier needs to accept before you can sell.

In the Broker Link, you are able to see what active contracts you have, as well as submit a request to be contracted with a new carrier.

Please note: to start off you should only get contracted with a few major carriers. We recommend getting contracted with the following: **Aetna, Humana, UnitedHealthcare, Wellcare**. Check with your direct upline to see if there are additional carriers in your state they suggest you get contracted with.

Production & Commissions

Here you will have access to view detailed reports about your production, such as how many policies you sold and for which carriers, as well as keep track of your commissions.
Click here to watch a video on how to use AgentVizion.

AgentVizion is also a helpful tool to confirm if you sold the minimum required policies to submit reimbursements for Brokerage Bucks.

Brokerage Bucks

"Brokerage Bucks" is a giveback program by The Brokerage Inc. that allows you to be reimbursed *up to* $450 per month for costs you spent on marketing as long as you have a production of at least 8 active applications (13 for the month of January) and you provide valid receipts.
Please note that the receipt needs to clearly show the total has been paid, not just invoiced.

To be clear, production refers to sales of a policy for a ***specific effective date***. For example, if in March you sold 10 policies total and 8 of those had an effective date of 04/01 then your production in April was 8 policies. Assuming all policies went through and became active, then you'd be able to submit for Brokerage Bucks reimbursement for April!

Here are some examples of marketing materials that count towards Brokerage Bucks:

- Hand sanitizers, candies/mints, or goodies that you use for your retail booth
- Personalized pens for marketing
- Purchasing lunch for marketing events (such as Turning 65 events)
- CRM usage such as AgencyBloc
- Lead Generation costs

You can submit for Brokerage Bucks reimbursements up to 6 months after production. For example, you can submit reimbursements for January production up until July.

You can also be reimbursed for your E&O license and your AHIP certification.

➢ E&O - Submit 9 applications within the E&O term (1 year). Reimbursement of up to $350
➢ AHIP - Submit 5 applications within the year. Reimbursement of up to $125.

For every Brokerage Bucks reimbursement request you must submit unique production; policies cannot be repeated or reused for multiple reimbursement types. For example, if you used a policy production for June Brokerage Bucks you cannot use that same policy in your reimbursement request for your AHIP.

Marketing Materials

You will have access to a variety of materials such as:

- Social media posts
- Blog posts
- CMS approved marketing materials for retail booths, T65 events, education events, etc

Marketing is an essential tool as an agent and is a way for you to stand out and show your clients who you are and why they should want to work with you.

Training Resources

This section will include a variety of webinars, compliance information, and professional events.
Many of the events include networking opportunities, such as with medical providers and carriers, and are great for relationship-building.
This is incredibly helpful so you can continue to elevate yourself professionally and expand on your knowledge, at no cost to you.

Discounts

You will have access to discounts on a variety of resources and required materials. These include CRMs such as AgencyBloc and Medicare Pro, your Errors & Omission license, marketing websites, and BrightFire.

Plan Search & Application Submission

Through the Broker Link you will be able to access **Simply Enroll**, which allows you to search and compare plans, as well as submit applications. Simply Enroll will be discussed in the next section of this guide.

Section 2: Simply Enroll

Simply Enroll is going to be your go-to website when it comes to helping out your clients and learning about available plans. This will also be the platform you use to process applications for your clients.

What it's used for

- Searching & comparing plans
- Custom-branded landing page for Medicare education
- Sending Scope of Appointment (SOA)
- Save client contact information
- Enroll clients
- Retail tracking*

*Walmart only

Details

Plan Information

Through this platform you'll be able to look up a client's current plan or read through available plans during your free time. This is recommended, so you can familiarize yourself with unique aspects of certain carriers or plans.
You also have the option to compare up to 3 plans at once and view the details & differences side by side.
From here, you can also download the Summary of Benefits to email to clients when you present them their options.

Remember that plans vary by location, so to get accurate quotes you'll need to have the client's zip code.
You will also have the option to plug in the client's doctors, medications, and any other preferences (flex card, extra benefits, etc.) to filter through plans.

Scope of Appointment

As mentioned before, a Scope of Appointment (SOA) must be obtained prior to discussing plan specifics with clients, with a few exceptions. Through Simply Enroll you'll be able to send the SOA via email or text to your client.

Client Information

You can save contact information for your clients so you can reach out to them at a later time, as well as send plan quotes directly from Simply Enroll.
Having clients' contact information saved is especially helpful during AEP when you're comparing clients' plans against the new ones rolling out. Clients will also call with questions, so this website is useful to have on hand to pull their details up so you can efficiently help them with any questions or concerns.

Retail Tracking

This is ONLY relevant for Walmart Retail. Whenever you are going to submit an application for a client that you acquired through working a booth at a Walmart, it must be done through the Retail Portal in order to keep track of applications and ensure accurate reporting.

Please click here to view a slideshow on how to use these platforms.