

# SALES PRESENTATION CHECKLIST

## Before Your Appointment

### Be Prepared

- Have your SOA ready
- Make sure you have all the plans you wish to discuss available
- Be sure to ask the proper questions to find the best plan for your client:
  - Do you have your red, white and blue Medicare card available?
  - Do you have a membership card for any other insurance, such as a Medicare Advantage, Supplement or Part D plan? If so, which one?
  - Do you have group retiree health care coverage from a previous employer? If so, what is the monthly premium?
  - Does the state help to pay for your Part B premium or your Part D copay?
  - Is there someone who helps you make decisions about your health care? If so, please ask that person to be present for our meeting.
  - Does someone have a Power of Attorney (POA) for making your financial decisions? If yes, if they will they be signing your enrollment form, please ask them to bring a copy of the POA document.
  - Would you like to invite your friends, relatives, or other Medicare-eligible individuals to the presentation? **Note:** An SOA must be completed for each additional person if they enroll.
  - Please have ready a list of your main doctors and hospitals. If you'd like assistance with finding your prescriptions the on the drug list, I can help you with that.
  - In order to help you select a health plan that best meets your needs, is there any other additional information that you need me to know ahead of our appointment?

DO	DON'T
Clearly identify the products you will discuss before you begin an <b>ONLY</b> discuss those stated in your SOA	Discriminate in any way. This includes discouraging enrollment for those with disabilities or attempting to enroll someone with a clearly diminished capacity to understand the implications
Utilize translation services when needed	State that specific Medicare plans are CMS endorsed or recommended by the Federal Government
Quote accurate product rates provided by Cigna Medicare	Compare our benefits with another company's, unless using comparative materials approved by CMS
Confirm that your prospect has Medicare Parts A & B, does not have ESRD and lives in a service area	Use misleading, conflicting or confusing statements about our products
Use only CMS approved materials that are unaltered	Engage in high pressure or scare tactics
Verify that your prospects providers are in network. Show them how to access and use the Online Provider Directory.	Collect financial info (such as bank account or credit card numbers) during pre-enrolment activities
Advise your prospect how to use the formulary, but never ask to see their prescriptions unless they request your help with this	Imply that our Medicare products are available only to seniors
	Offer monetary or promotional gifts to encourage or compensate enrollment