



ARE YOU READY FOR THE MEDICARE OPEN ENROLLMENT PERIOD?

FIND OUT WITH THIS MEDICARE OEP READINESS ASSESSMENT CHECKLIST.

As this year's Annual Enrollment Period is in the rear-view mirror, KERN Health can help ensure you are prepared for the Medicare Open Enrollment Period (OEP). This period can be difficult, as you need to onboard and retain new and existing members while also looking to add new membership.

We've put together this core set of Medicare marketing tasks to help you be successful during OEP. Hopefully, this simple assessment will give you a good sense of how you're doing and help you make sure you're properly onboarding and building a strong rapport with new members to maximize retention and minimize switching behavior with existing members. And, at the same time, using this assessment will ensure you have a strong brand awareness and a new-to-Medicare program in place to actively market during this time in accordance with CMS guidelines.

If you'd like some help meeting your sales goals, retaining your members and building a robust onboarding campaign, give us a call.

WANT TO TALK MORE ABOUT YOUR OEP READINESS?

Call Elliott Dennis at **312-404-4807** or email edennis@kernagency.com to schedule an appointment and learn more about how KERN Health can help you increase retention and enrollment acquisition during OEP.

KERNHEALTH
AN OMNICOM AGENCY

MEDICARE OEP READINESS ASSESSMENT CHECKLIST

- You are planning a content-driven, omnichannel, brand awareness advertising campaign during OEP to stay relevant and top of mind for those who may be looking to switch.
- Your OEP media plan consists of, at a minimum, SEM, social and digital marketing.
- Your omnichannel age-in campaign is active during OEP, so you can promote benefits and show the true value of your plan offerings.
- Data model your new membership to see if there are trends or patterns in the types of people selecting your plans.
- You plan to optimize the onboarding experience for new members to increase retention.
- Look for ways to create experiences, show value and engage members in a real and natural manner.
- You are including educational content about plan offerings, services and expanded benefits in your new member communications.
- You plan to survey members with a short health assessment that will provide data for customized, ongoing communications.
- You plan to put the needs of your members first by educating and engaging with members as they need the plan's help.
- You have included content regarding your plan's ancillary benefits—like transportation, grocery delivery, etc.
- You plan to promote benefits to guard against the top reasons for switching (premium increases, drug coverage, network access issues, dental coverage and referral/authorization issues) in your communications.
- You are promoting your plan's Star Rating.
- Your communications establish an emotional connection between members and your health plan, and promote your plan as something they can count on to improve their overall health.
- You plan to provide sales enablement tools for your sales and broker teams, and ensure they are properly trained on the policies of OEP.
- Develop educational and onboarding materials in video and other formats to capitalize on consumer preference.
- You will offer virtual educational events and resources to your members to facilitate one-to-many and one-to-one brand engagement and question/answer sessions.
- You are properly leveraging data and analytics to personalize communications to new and existing members based on different risks of enrollment segments.
- You will institute a member welcome call to gain more information on the member, answer questions before the member uses benefits book any needed care plan interactions.
- You plan to continue and optimize your age-in marketing program to those who are new to Medicare and have not yet made an enrollment decision, expanding channel tactics.
- You have reviewed the UI/UX of your site and landing pages for ease of use by multiple audiences/ pathways—new member onboarding/education, prospects, age-in and current members.

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OEP EXECUTION

- You've developed an integrated brand advertising/marketing program that reaches your target audiences across multiple media channels.
- You have brand television spots in alternate lengths, planned to run in varying dayparts, as well as shorter-form video in place for social outreach.
- You will promptly send an application confirmation to new members, confirming not only receipt, but also when it will be approved and when they can expect to receive their new ID card.
- You have made it easy for your new members to choose their PCP because once a PCP is chosen, that member is less likely to switch.
- As a new member activity, you are incentivizing your new members to take a health assessment survey that can be shared with their chosen doctor.
- You will provide digital copies of ID cards immediately upon enrollment.
- You will deliver a personalized welcome kit and/or email to all new members.
- You have specialized OEP member onboarding and educational virtual events planned, supported by customer service, field marketing organizations and sales agents, if needed.
- You have tracking mechanisms in place that will gauge the effectiveness of all marketing tactics.
- You have the ability to make adjustments to the campaign based on what is working well and what is not, and can make adjustments, as needed.
- You have a dashboard in place that will provide metrics on key performance indicators, which you can track throughout OEP.

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