Your Guide to Client Follow-Ups

When Should You Follow Up? What Should You Talk About?

To build strong client relationships, we recommend a 3-30-60-90-day strategy of follow-up conversations after client enrollment. Each one serves a purpose, and together they add up to a better experience for your client while also creating opportunities for you to grow your business.

Scheduling Follow-Up Meetings

Immediately after you've enrolled your client, let them know you are scheduling four in-person or virtual meetings with them to make sure everything is going well and to cover some important topics. Set up these meetings with specific dates and times for 3, 30, 60, and 90 days after their enrollment, and send the information to your client so they can put it on their calendar.

Conducting the Follow-Up Meetings

Follow-Up Day	Goals for This Conversation	Topics to Discuss
3	Reestablish communication and thank them for their enrollment. Set a framework for what they can expect from their carrier and from you as their agent.	• Remind them of the plan they enrolled in • Let them know their enrollment materials will arrive from the carrier • Extend an invitation for them to reach out if they have questions
30	Your client may not have utilized their plan yet, so they may not have any specific questions. Bring any carrier materials that might be helpful to the client.	• How to pay premiums • Benefits of the plan they might not know • Resources for caregivers (if applicable) • Questions they might have about plan materials they've received • Reminder to book annual wellness exam
60	Build from the last meeting. By now, clients may have feedback on their experience with the plan. If they like the plan, continue the topics from the 30-day meeting. If they are unhappy, you may be able to take steps to address any changes that they need.	• Refresh of topics from last meeting • Preventive care options, such as flu shots, cancer screening, etc. • Plan satisfaction so far • Special programs for seniors in their area they might want to explore
90	Clients will likely have used their plan by now and will have feedback on how it is working for them. If they are having issues, the agent can take immediate action to try to fix the problem. If the client specifically asks about other plan options and it is within the OEP window, the agent can discuss other plans.	• Refresh of topics from 30-day and 60-day meetings • Special enrollment periods, if applicable and compliant • Referrals • Let client know they can reach out with questions any time

PRO TIP: Use the 3-30-60-90 Day Overview Guide for more in-depth strategy, tips for success and vital compliance guidelines.

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