

PlanEnroll Network Agent Guide

Engage and connect with current and future clients

PlanEnroll is a consumer-facing platform that helps consumers feel confident in their Health and Life insurance choices.

PlanEnroll also helps agents like you build strong relationships with current and future clients.

Benefits of becoming a PlanEnroll Network Agent



Agent-personalized Website

Clients can link directly to you for personal guidance — or compare and enroll in plans while you receive credit!



Marketing Materials

Get access to consumer marketing materials and resources that can help you connect with clients and serve them better.



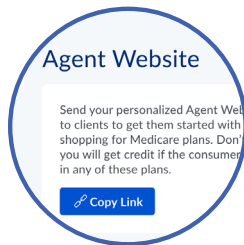
Consumer Profile Linking

With Client Sync, clients can securely save their health information and preferences in PlanEnroll through your Agent-personalized link. This connects them to your client contact record in IntegrityCONNECT, making it easy for information to be updated by you or your client.

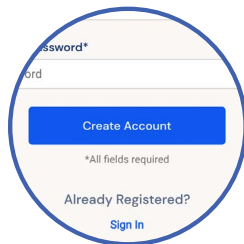
Maximize your impact as a PlanEnroll Network Agent

It's simple to become a PlanEnroll Network Agent! Just complete a short series of training videos on Trainings.PlanEnroll.com.

Once your training is complete, there are several ways PlanEnroll integration helps you expand your reach.



1. **Agent-personalized Website** — Use your Agent-personalized Website to connect to current and future clients. Add it to marketing materials, emails and more. Many consumers will appreciate being able to browse plans on your website, then enroll when they're ready or connect with you for personalized guidance.



2. **Consumer PlanEnroll Profiles** — Encourage your clients to create a PlanEnroll profile using your Agent-personalized Website so they can enter and securely store their information for easy reference. You'll be able to update their information, too!



3. **PlanEnroll Exclusive Lead Campaigns** — Create a PlanEnroll Lead Campaign in IntegrityCONNECT Leads, then click the "I'm Available" toggle to receive Realtime calls or data leads.

PlanEnroll was built help you grow your business and serve more clients! Get started today by going to Trainings.PlanEnroll.com!