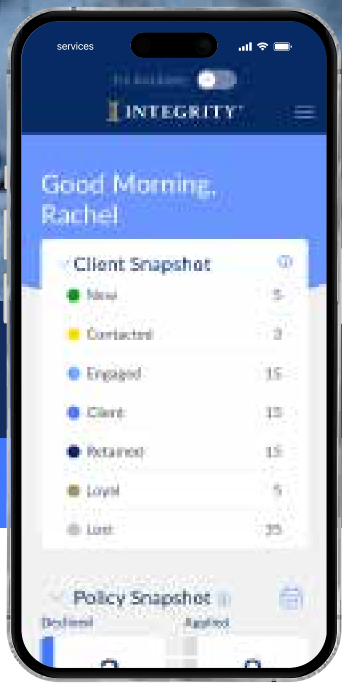
TECHNOLOGY PLAYBOOK

Integrity Suite of Solutions



New Horizons℠
insurance marketing
AN INTEGRITY COMPANY

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YOUR AEP 2025 PLAYBOOK

AEP is a critical time for agents who focus on Medicare Advantage sales. In 2025, Medicare updates from the Inflation Reduction Act are anticipated to bring disruptions to the industry.

Expected disruptions include plan and coverage changes that will create navigational challenges for consumers and agents alike.

This Technology Playbook shows you how the Integrity Suite of Solutions is a crucial resource this AEP to help you manage workflow, streamline communications and build stronger client relationships along the way.

The Integrity Technology platform includes:

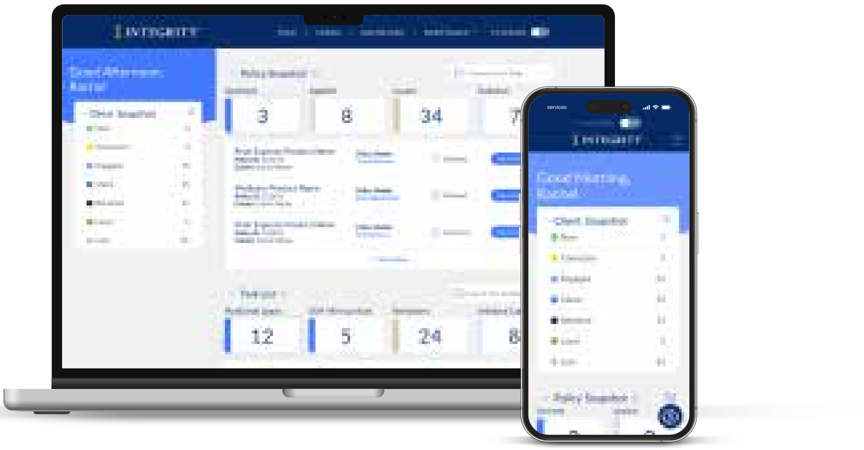
- Client Management
- PlanEnroll
- LeadCENTER
- Ask Integrity™

Each area of the platform offers key features and resources designed for you.

Integrity Suite of Solutions: For agents. By agents

Integrity Suite of Solutions

For Agents. By Agents.



INTEGRITY SUITE OF SOLUTIONS INTRODUCTION

This year's AEP is shaping up to be disruptive and challenging. Integrity Technology helps transform disruption into opportunity so you can serve even more clients — more efficiently!

Integrity's Suite of Solutions is designed to help agents, advisors and agencies:

- Save time
- Be more effective
- Easily stay compliant

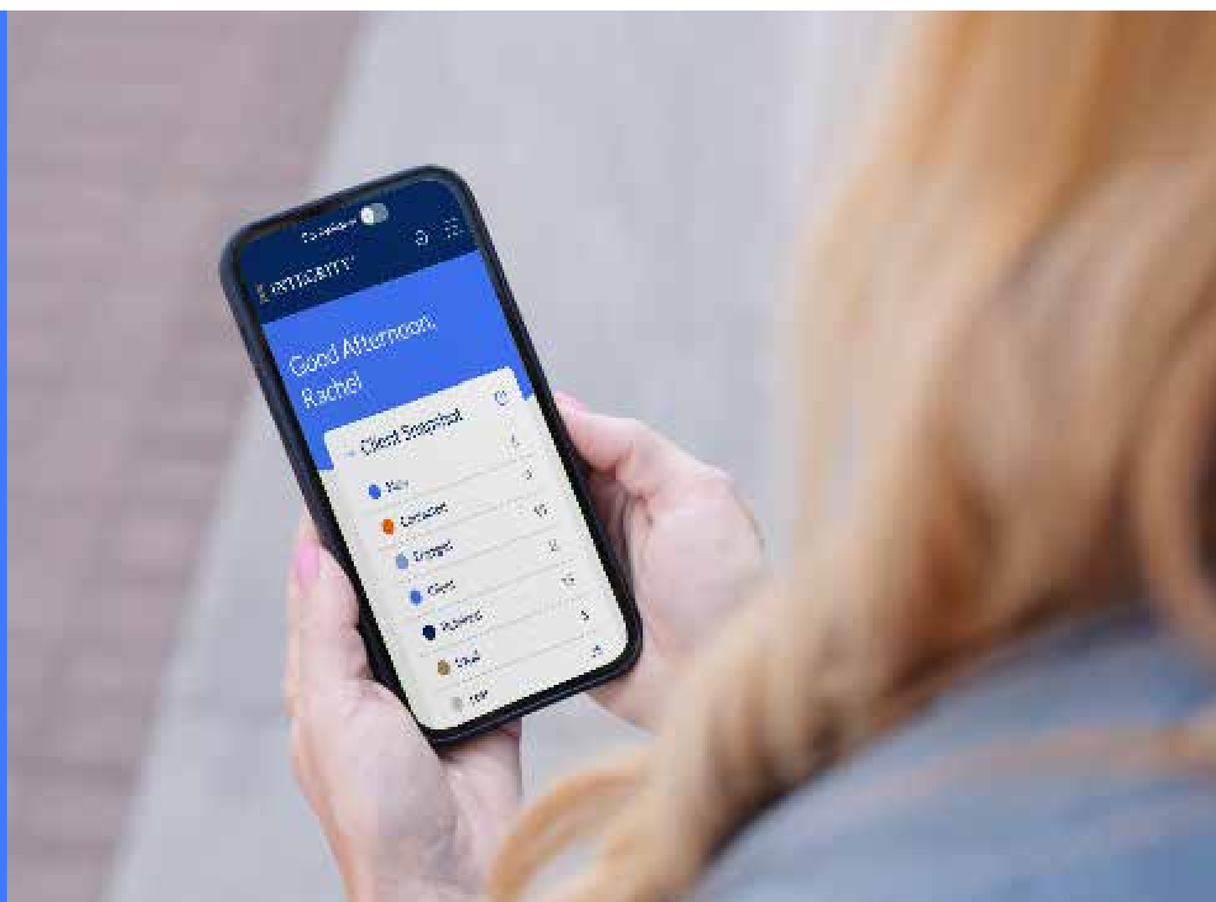
Integrity Technology is built by industry leaders to connect your most important activities, including:

- Client Management
- Quoting and eApplication
- Marketing
- Lead Generation
- And more

Why use Integrity Technology?

- First-year agents using our technology are 50% more productive
- Agents that use our technology write 64% more apps than agents who don't

Integrity's Suite of Solutions will help you transform disruption into opportunity.



INTEGRITY CLIENT MANAGEMENT

We built client relationship management directly into our platform to help you manage your client relationships, preferences and deadlines.

Integrity Client Management offers multiple features to streamline your workflow.

Each contact record lets you view client info, including doctors, prescriptions, pharmacies, plan info and custom notes. By clicking Contacts in the top menu, you'll be able to see:

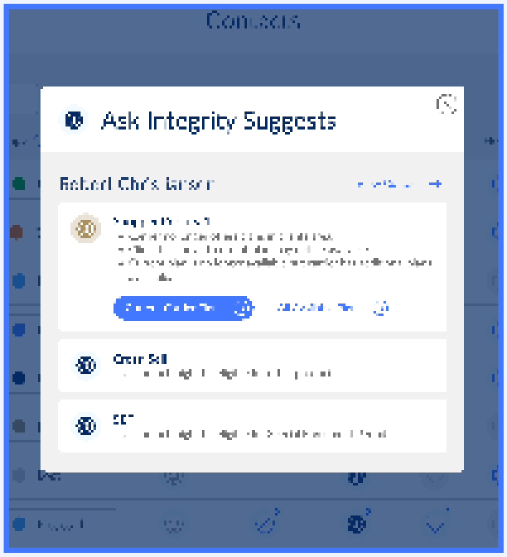
- Contact Name
- Stage (New, Contacted, Engaged, Client, Retained, Loyal or Lost)
- Tags (Reminders, Campaigns, Ask Integrity)
- Health Policies (policies sold through an Integrity upline)
- Contact Information

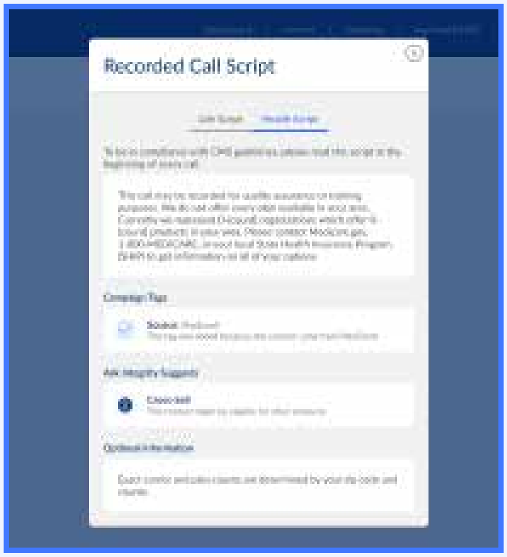
Contact Details for each record show you:

- Reminders and Tasks — View follow-up steps for each client
- Automatic Call Recordings — Saved for 10 years, per CMS requirements
- 48-Hour SOA Tracking — Ensures compliance in your communications
- Client Notes — Add helpful information about your client, from family members to personal hobbies
- Health Information — Providers, prescriptions, pharmacies and more are stored securely and can be used to customize quotes
- Policy Information — Shows current and past policies

Client Management saves you time and effort, while adding a personal touch. If you've entered a client's profile notes, check them before your call and you'll be able to ask about their pet or mention their favorite hobby.

Use Integrity Client Management to help run your business year round to save time and effort, and stay on top of client needs.





INSTANT INSIGHT

Serving your clients well means understanding what they might need and when. You need easy access to insights that will help prioritize your next steps.

Get Instant Insight about your clients with our automatic contact tagging and advanced filtering to make it easy for you to work more efficiently.

Automatic contact tagging identifies:

- Special Enrollment Periods
- Cross-Sell Product Opportunities
- Carrier
- Product Status
- Product Type
- Any other attribute with Custom Tags

Filtering gives you the power to identify clients with multiple details and tags at the same time. You can even specify exclusions like clients NOT enrolled with a particular carrier.

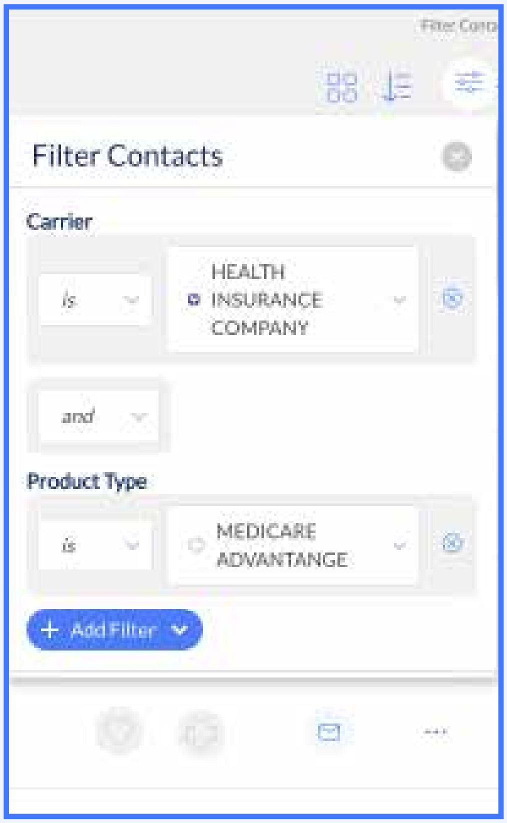
Filtering example: One of your carriers has a network change and is losing a hospital. To filter your clients, go to Contacts view and:

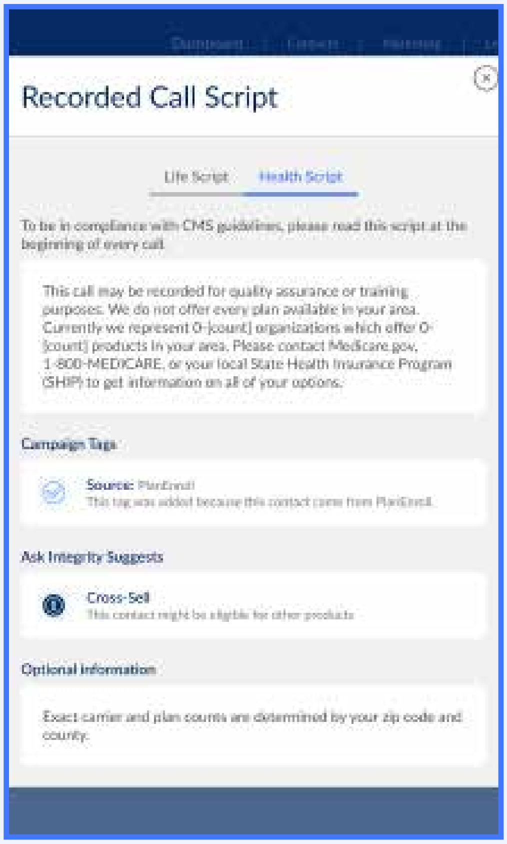
1. Click the Filter button to start a new filter.
2. Choose the carrier and the product type to start the search.
3. When client records are listed, click the three dots next to each one and "Add Reminder".
4. Add reminder details such as "This client has an upcoming network change", then save and continue with the next client.

Plus, Instant Insight provides you with in-the-moment sales recommendation scripts and pop-ups, powered by Ask Integrity, to discuss with your client to help them make informed decisions.

Instant Insight with Tagging and Filters saves you time and effort by helping you navigate right to the clients who need help and reaching out to them.

It's all part of Integrity's Suite of Solutions — built for agents, by agents.





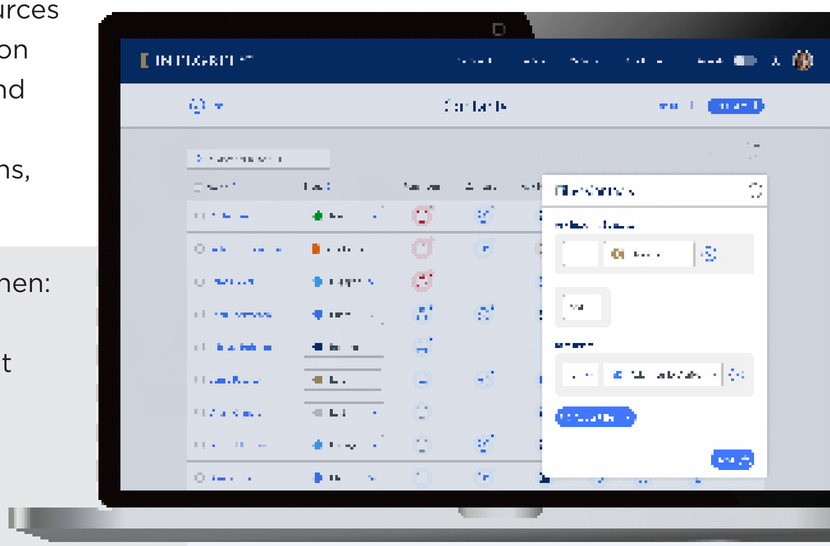
ASK INTEGRITY SHOPPER TAGS

We know you want to help, find and support clients who may be likely to shop for a new plan.

The Ask Integrity Shopper Tag makes it simple to identify your clients with upcoming plan changes. You'll even get a rating telling you how likely they are to shop!

- Ask Integrity Shopper Tags:
- Identify clients likely to shop during AEP
- Use existing client profile information to assess current plan details compared to upcoming plan changes
- Help agents prioritize client to-dos
- Compare client needs and plan options for more accurate recommendations
- Indicate low, medium or high likeliness to shop during AEP

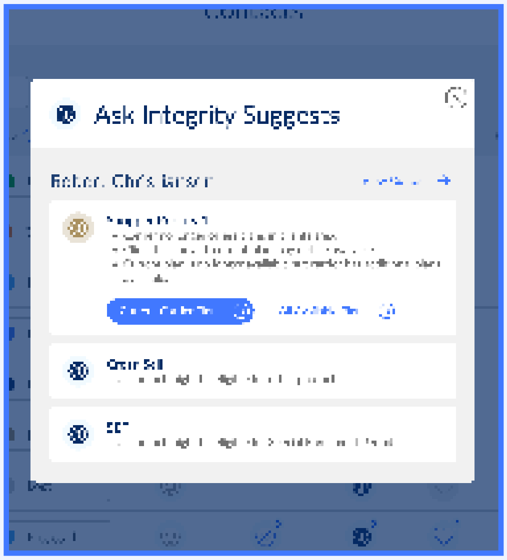
The new Shopper Tags are powered by multiple sources of data, connecting your client records to information about upcoming plan changes. This can help you find options to recommend for clients with up-to-date profile information — including doctors, prescriptions, pharmacies and current plan details.



To use the Shopper Tags, go to your Contacts list, then:

1. Create a new Filter using the Filter button.
2. Use the "Ask Integrity Suggests" filter to select Shopper 1.
3. Click Save to show your results.
4. For each client record, use the Ask Integrity icon to connect directly with your client.

Shopper tags help you prioritize and filter your contact list and make more accurate plan recommendations to save you time and effort.

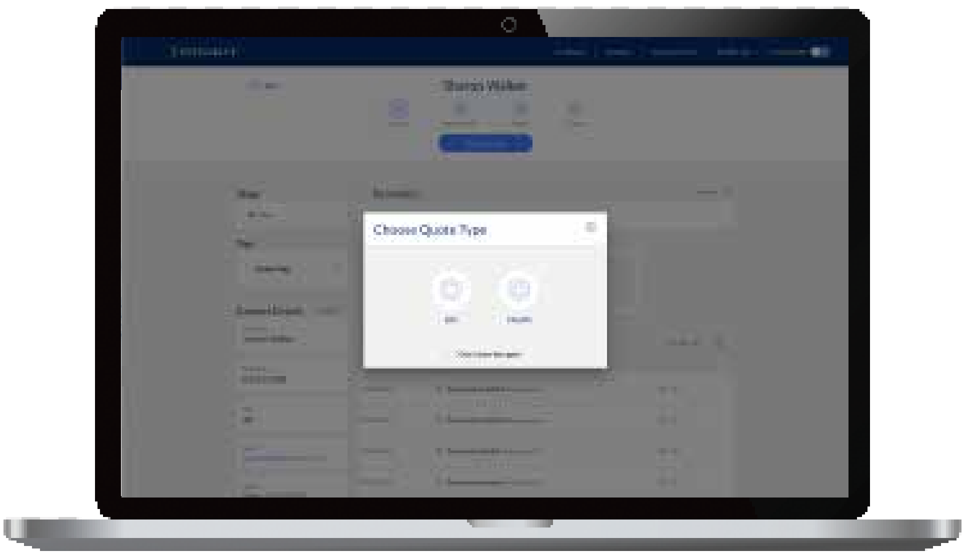


INTEGRATED QUOTE & EAPP

We know that when you meet with clients, it's critical to have the right answers to meet their specific needs and build deeper trust. That's why we've supported you with features like our integrated Quote & eApp — to help make your clients' enrollment experience even easier.

Integrity's Quote & eApp:

- Instantly populates quote and enrollment forms with your client's information
- Uses trusted industry quoting sources for accurate, competitive quotes
- Integrated right into Integrity Client Management
- Streamlines enrollment by making it fast and accurate



Here's how to use Quote & eApp:

- Start by verifying your client's doctor, prescription and pharmacy information.
  - Update your client's record with them on the phone, or walk them through how to makes updates on their own PlanEnroll Profile using your Personal Agent Website link.
- Once their information is correct, click the "Start a Quote" button.
- You'll see a list of available plans in the client's area. Use this to create up to three quotes and review available options with your client.
- Once they've chosen a plan, you can easily start their application with the Apply button. Your client's information is prepopulated right into the application.
- Submit their application when everything is correct, and the client can then see and accept the quote.

With Integrity's Integrated Quote and eApplication features, the client enrollment process has never been faster — or easier!

CLIENT CONNECT

Integrity created an easy way for you to send compliant marketing messages to your clients. From addressing policy changes and gathering client information to simply wishing them a happy birthday — our new Client Connect feature lets you do that and more!

Client Connect:

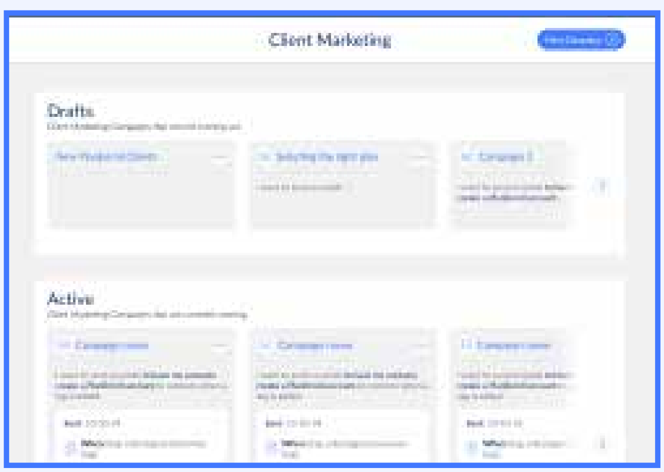
- Easy to find in your Client Marketing dashboard
- Makes it simple to connect with a group of clients using email or to send a text to individual clients
- Compliant messaging templates save you time and effort
- Automatic groupings help you prioritize who to reach out to first
- Message templates are specific for each targeted group — no extra work for you
- Messaging history shows up in each client's contact record activity stream

How to use Client Connect:

- Click Marketing to view your Client Marketing dashboard.
- Click New Campaign to start a message.
- Choose to send an email or a text message, and select the template type desired.
- Select who you'd like this message to go to — one contact, all contacts or a filtered contact list.
- Click Preview Campaign to see a preview of the message. Your name, contact information and Personal Agent Website link is automatically included.
- Click Send Campaign.

Integrity's Client Connect gives you options to reach out to clients. From addressing policy changes and gathering client information to simply wishing them a happy birthday, Client Connect lets you do that and more.

Now you can communicate easily with your clients throughout the year through email and text message. And with our ready-to-go marketing messages, you'll save time and work more efficiently!



ASK INTEGRITY DIGITAL ASSISTANT

Ask Integrity is the industry's first AI-powered digital assistant, and it's here to make your job easier. Ask Integrity provides convenient and secure access to client information on the go and so much more.

Ask Integrity will help you:

- Prepare for upcoming meetings by providing a summary of recent client calls
- Provide key client details before a client call
- Complete a preenrollment review or capture missing client preferences for accurate quotes
- Assess client needs during their application process, make recommendations for specialists and more
- Offer clients the coverage that's right for them, based on their unique situation
- Work from anywhere — Ask Integrity is available on desktop and mobile devices

Here's how Ask Integrity helps you get ready to meet with a client:

- On your mobile device, use the Ask Integrity button to review your last client meeting.
  - You'll hear an overview and will have the option to hear a full summary.
- When you're ready to meet, you can simply click on Get Directions to instantly view map directions to your client's home.

Ask Integrity can also help with specialist recommendations or missing preferences.

- If you've added a prescription to your client record that indicates the need for a specialist, Ask Integrity will help you find and add the provider.
- Ask Integrity can alert you if you have clients with missing profile information.

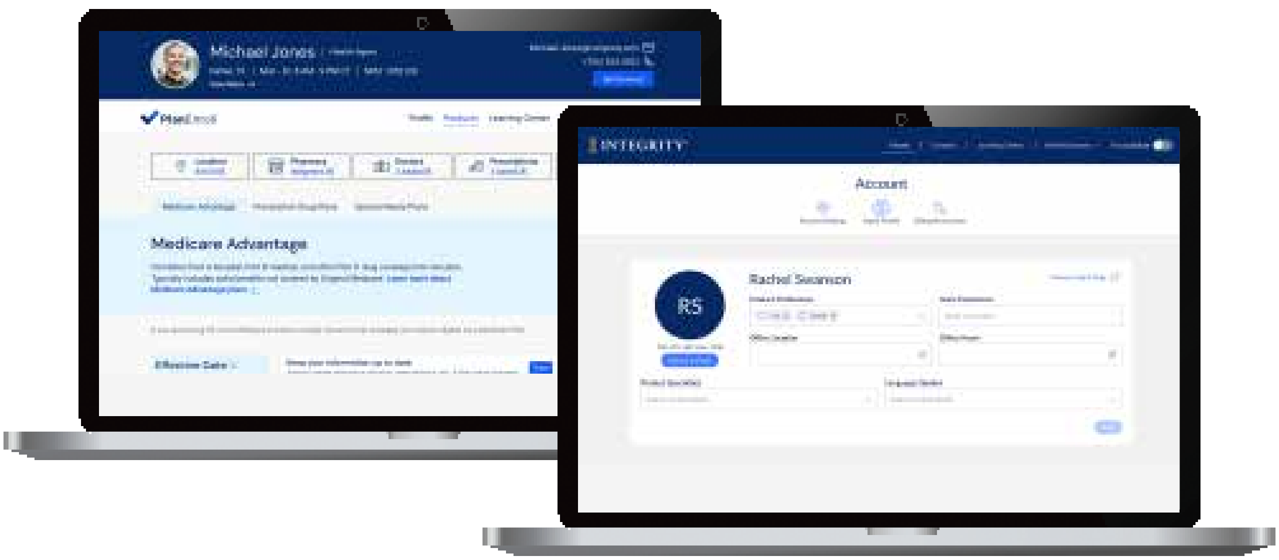
Combined with the Call Recording feature, Ask Integrity provides call transcriptions and client summaries so you never miss a detail — put your digital assistant to work for you!

PLANENROLL PERSONAL AGENT WEBSITE

We know you need a professional and convenient way to connect with clients, establish trust and allow them to easily review and compare plan options.

The **PlanEnroll Personal Agent Website is your fully compliant website** personalized with your information and contact details that you can share with clients.

Your PlanEnroll Personal Agent Website lets you:
- Upload your profile photo, bio, areas of expertise, languages spoken and more
- Share your link with clients so they can easily update their own profile information, which syncs their information with your Contact Record
- Deliver quotes right to clients so they can review and compare plans
- Communicate your hours of operation and contact info
- Differentiate yourself in your market!



Using your Personal Agent Website:
- Personalize your Personal Agent Website right from your Integrity account.
- Copy your Personal Agent Website link from your Integrity Account page.
- Easily paste and share your link in emails, marketing materials and communications with your clients and prospects.
- Quickly create quotes and email them to your clients along with your Personal Agent Website link.
  - Clients can then review and compare the quotes, select the one they want, and begin enrollment immediately!

Start using your Personal Agent Website today!

PLANENROLL CLIENT SYNC

We understand how important — and challenging — it is to get your clients' details, including their permission to contact and a signed Scope of Appointment.

Client Sync is here to make it even simpler for you and your clients to connect — while keeping data secure.

Using Client Sync is simple. Let's say you have a meeting coming up with a new client. Schedule a quick phone call so that you're both prepared for the meeting. While on the call:

- Send your client a link to your Personal Agent Website and have them click Get Synced to complete their profile.
- Have them enter information as it's requested on the screen, starting with the basics, and then move to health details and current health coverage.
- Your client will see their progress every step of the way
- Have them request a Scope of Appointment by selecting the types of products they want to discuss and indicating consent on the form.
- Have them add a password for their PlanEnroll Profile to complete their profile registration.

Now, you'll be ready for your client meeting with quotes and plan recommendations for their unique needs.

PlanEnroll Client Sync helps you connect with consumers, stay synced and work more efficiently.

CLIENT MANAGEMENT AND LEADCENTER

It can take time to put your name out in the market to bring in new consumer leads. We have a solution that makes lead generation simple.

LeadCENTER — integrated with Client Management — is your solution for the compliant, high-quality leads you want. Shop for leads that are available now, set up automated orders or create your own campaign. Find the lead types that you want, where you want them, that fit within your budget, and even drive real-time leads to your phone or inbox!

LeadCENTER Lead Options:

- Marketplace: Buy leads, from non-Medicare Advantage ads, that are available right now
- Automate and Save: Set up recurring Marketplace orders and save 15%
- Realtime Lead Campaigns: Warm leads sent to you as phone calls or data leads
- Custom Ad Campaigns: Send preapproved, compliant direct mail pieces to consumer mailboxes in the area you choose

To connect with consumers in your area, here's how to create a Custom Ad Campaign:

- Navigate to Campaigns, then choose Custom Ads and click Create Ad Campaign.
- Choose Health or Life, select your Creative Type and click "I want this one".
- Select your geography, click Add, then choose age range and income.
- Finish your campaign details with the name, number of pieces to send and your name and contact information. Make sure you use your Integrity Agent phone number.
- Click Next to preview and confirm payment information.
- Launch Campaign to send your campaign to consumer mailboxes in about 10 days!

Even better, LeadCENTER integrates directly with Client Management, so you can access your leads and start the sales process with ease. No need to reenter data across platforms!

Client Management and LeadCENTER work together so you can work better.

PLANENROLL EXCLUSIVE LEADS

We know how hard you work to find consumers who are ready to engage. We created a solution to make it easy: PlanEnroll leads.

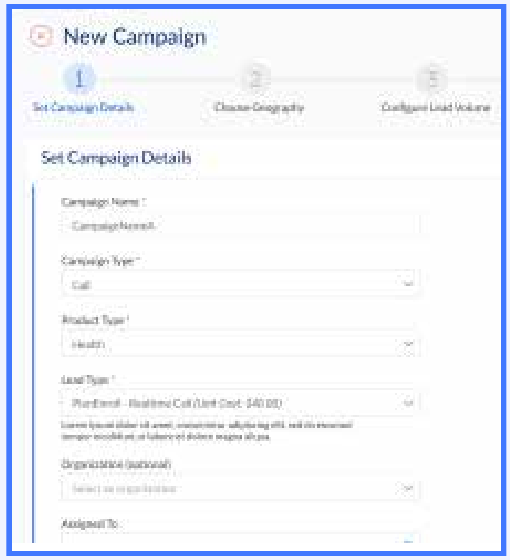
PlanEnroll Exclusive Leads deliver value.

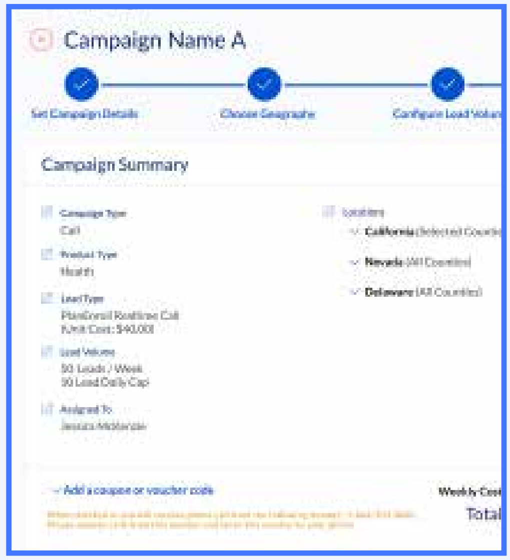
- Leads are fully compliant
- Leads are subsidized to bring the cost down
- Leads are exclusive, proprietary and only available to Plan Enroll Network Agents
- Leads are sourced nationally through paid search, DRTV, direct mail and social media
- Choose Realtime call or data leads to get the leads you want, how you want

Here's how to reach consumers with a PlanEnroll Realtime Campaign:

- Start in LeadCENTER Campaigns, then click Create Campaign.
- Set a campaign name, choose Campaign Type, Data or Call, then choose Health as the Product Type.
- Under Lead Type, choose the PlanEnroll Realtime Lead Campaign.
  - If you don't see PlanEnroll lead campaigns, make sure to complete your PlanEnroll Network Agent training at Trainings.PlanEnroll.com.
- Make sure your name is showing in the "Assigned To" field, then click Next.
- Choose the geography you want, click Add, then click Next.
- Set your lead volume per week (from 5 to 100), then click Next to review your details.
- Add your payment info, then click Launch Campaign.
- Next, log in and switch on "I'm Available", and consumers will be connected directly to you through your Integrity Agent Phone Number.
  - Make sure to switch off "I'm available" when you're not actively taking calls.

LeadCENTER with PlanEnroll exclusive leads makes it easy for you to connect with engaged consumers. Become a PlanEnroll Network agent, and exclusive access to leads can be yours!





INTEGRITY TECHNOLOGY TRAINING AND RESOURCES

Integrity's Suite of Solutions is built for agents, by agents. And it's designed to work the way the industry's best agents work.

If you want more in-depth information about how to get the most out of our technology, we have a variety of trainings, guides and resources available to help drive your success.

Training and Resources:

- Weekly live trainings to demonstrate how to get started and keep going strong
- On-demand library of prerecorded trainings
- Downloadable guides with step-by-step instructions available on Integrity's LearningCENTER
- LeadCENTER with a robust Frequently Asked Questions section
- Personal assistance from the Integrity support team

Don't forget: Agents who use Integrity Technology write 64% more applications than those who don't!

Help more clients. Drive your success.

Integrity Suite of Solutions: For agents. By agents.