

Medicare Sales and Marketing Oversight Assessments

Pre-AEP Services



Broker Assessments

Need oversight of your field marketing organizations? Often plans delegate activities to their brokers or general agencies. Oversight is a critical component to the success of your FDR and compliance program. BluePeak understands the nuances of ensuring each delegate is performing sanction reviews, maintaining licensure, training, and appointment documentation, as well as collecting and providing accurate, timely responses for follow-up inquiries, such as scope of appointment or marketing material misrepresentation complaints. Let us help you conduct your oversight before you find yourself buried in another AEP cycle.



Sales Training Development Support

Need a solution on how to deliver your product specific training? BluePeak can develop customized computer-based training for sales agents and brokers highlighting changes and new features of the Plan specific benefit design. This offers a convenient and time-saving way for agents and brokers to learn about your unique plan design.

During AEP Services



AEP Agent Secret Shopping Reviews

BluePeak performs live and recorded reviews to evaluate the compliance of the prospective sales calls. BluePeak representatives will conduct mock prospective member calls. During the call they will request plan information, review in-network providers and confirm formulary covered medications. The secret shopper will test hold times, TTY, language line, agent knowledge of the plan benefits, as well as providing you feedback on agent soft skills, all while ensuring your contracted agents are following the CMS marketing guidelines.



Third Party Marketing Oversight

One of the major reasons plans get into trouble is that they do not have an effective, robust, compliant internal and/or downstream vendor monitoring program. BluePeak can develop or assist you in developing a customized program that is CMS compliant, while able to be operationalized with limited time and human resources from a plan perspective.

Post-AEP Services



Sales & Marketing Oversight Assessments

Post AEP is an excellent time to take an inventory of how things went and where you can improve. BluePeak's Sales and Marketing Assessment can help you do just that! Our assessment can be customized to your needs and includes:

- Review of organizational structure
- Tele-Sales Center Workflow-including scripts
- Agent and Broker Oversight
- Annual Training

Our comprehensive report will provide you with a roadmap of areas for improvement.