

# Onboarding Process for

# MEDICARE

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## 101

### 1 *Introduction to Medicare 101*

Your introduction to our program begins with your attendance at a webinar, live event, or one-on-one meeting with a Medicare Mentor.

### 2 *One-on-One Interest Call*

You will have a scheduled call with a Medicare Mentor to go over lingering questions, desired territory, and next steps.

### 3 *You Will Receive a Welcome Email from Your Marketing Coordinator*

Your welcome email outlines what you and our team will be working on as we get ready for your workshops.

- A member from our Elite Contracting team will reach out to you to help with your contracting.
- You will receive a link to our Information for Materials questionnaire for submission.
- Your marketing coordinator will begin planning your marketing.

### 4 *Your Marketing Coordinator Will Schedule your Trainings*

As you work on your contracting, your marketing coordinator will reach out to you to start finalizing workshop details. You will also get applicable trainings scheduled and receive your presentation materials to begin practicing.

### *Review Best Practices*

5 Three weeks before your first workshop, you and your marketing coordinator will go over recommended systems and processes. At this time you should also receive all remaining relevant Medicare 101 materials.

### 6 *Workshop Training*

You will receive two workshop trainings (before and after) your first campaign to ensure your presentation sets you up for success.

### *Appointment Coaching*

7 You will have three to four coaching sessions on to help you uncover additional opportunities.