



Working with providers & physicians



Byron Edwards

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CA License: 1234567

Not affiliated with the U.S. government or federal Medicare program. We do not offer every plan available in your area. Any information we provide is limited to those plans we do offer in your area. Please contact [Medicare.gov](https://www.medicare.gov) or 1-800-MEDICARE to get information on all of your options

About Me

I'm a licensed agent with extensive experience in Medicare. I help you understand Medicare, enroll in the right plan, and maximize your benefits. I am an independent agent and as a result, I'm able to compare all the plans available to Medicare recipients on the public market.



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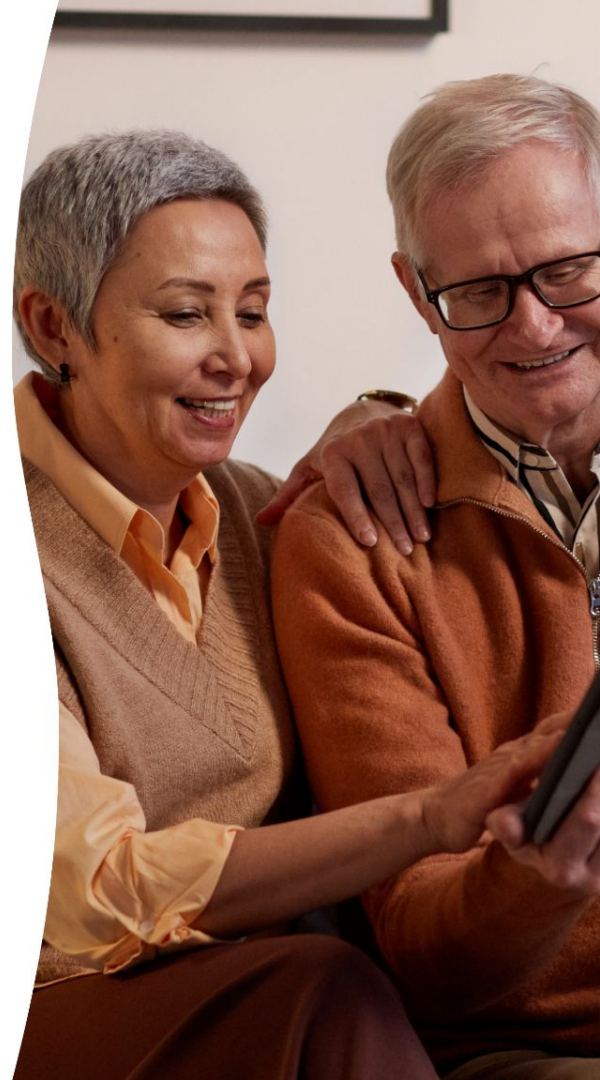
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Who I help

I assist clients who fall into one of these categories.

- ◆ Turning 65 within a 6-month window
- ◆ Older than 65, but losing insurance coverage
- ◆ Unsure whether to choose employer insurance or enroll in Medicare
- ◆ Unhappy with the current coverage
- ◆ On social Security disability



How I support providers

I am a true business partner addressing your biggest business needs:

- A** Grow your patient panel
 - B** Increase your patient revenues
 - C** Improve your patient experience
-
- My team works alongside you and your staff as a full-service agency partner

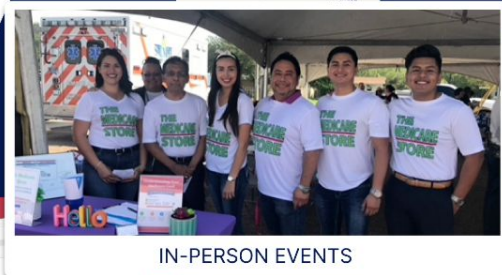


A Grow your panel

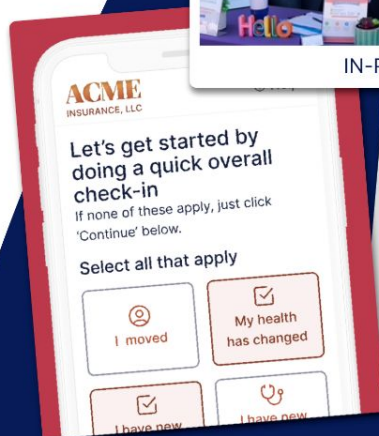
Grow your patient panel through marketing

I am a **local** agent with expertise experience helping thousands of people in this community with their Medicare needs. I can help with:

- ◆ Direct mail
- ◆ In-person events
- ◆ White-labelled digital engagement
- ◆ Social marketing



IN-PERSON EVENTS

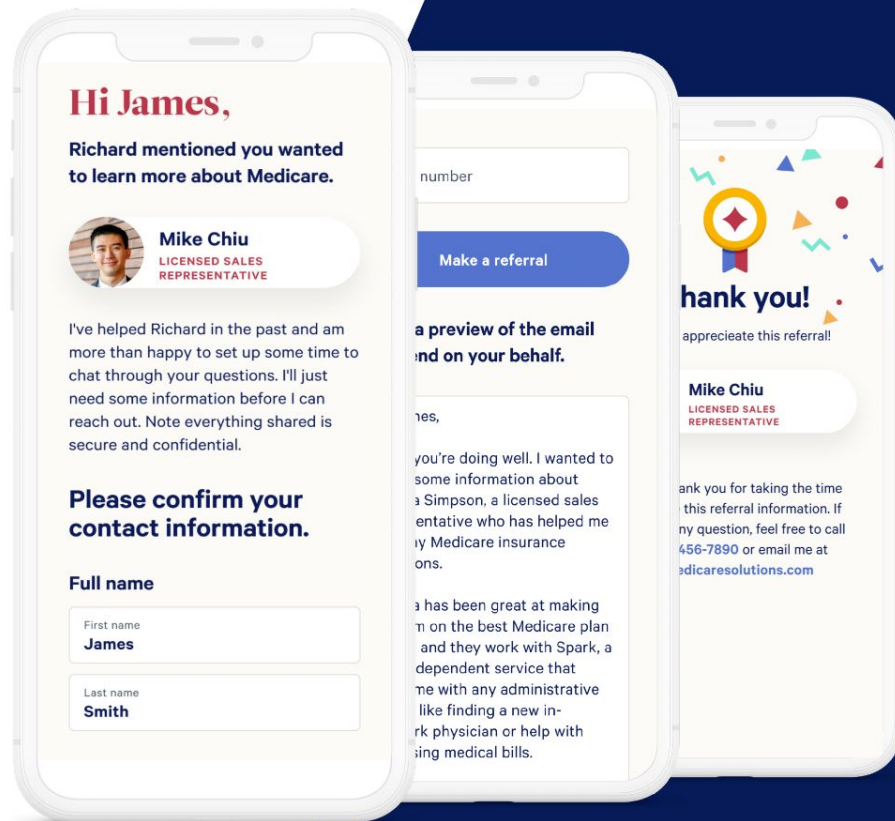


A Grow your panel

Grow your patient panel through referrals

I make every interaction an opportunity to build a relationship and make it seamless to generate referrals.

- ◆ One-click referral forms
- ◆ Notifications upon submission
- ◆ Follow-up to thank referrer



A Grow your panel

... and accountability

◆ Reporting on PCP assignment

All enrollments will have a provider for NPI matching

◆ Reporting in interest in clinic

All prospects tracked via lead form, source in platform, and/or enrollment

◆ Reporting is in real-time,

with some retrospective reconciliation based on production reports



B Increase your revenue

Increase your patient **revenues**

I deliver patient engagement campaigns that directly tie to increased revenues and higher retention.

I'm backed by a client service team from Spark that helps me deliver year-round client support.

For providers, this means I offer:

- ◆ **Appointment scheduling**
- ◆ **Multi-channel retention**
- ◆ **Annual wellness visits**
- ◆ **AEP support**



B Increase your revenue

The care navigation team behind me

Our team averages **10+ years of healthcare experience** from carriers and best-in-class service companies



◆ Personal health concierge

Help members select providers, find pharmacies, and manage medical bills.

◆ Extension of your team

We can proactively notify members about network changes and new programming.

The screenshot shows the Spark membership activity dashboard. The main view displays a list of activities for today, Monday, February 17. The activities include:

- A new note for Richard Webb was added.
- An outbound call to Lisa Johnson lasting 109 seconds.
- An email was sent to Richard Webb.
- A call named "Call: Welcome to Spark" was made.

A detailed view for a member named Ellen Johnson is shown on the right. The details include:

- Member Status:** Ellen Johnson
- Plan:** D-SNP Plan 1
- Effective date:** 01-04-2020
- Churn probability:** HIGH (indicated by a red dot)
- Churn reason:**
 - Medicaid renewal required
 - SEP eligibility
- Action:** Support with Medicaid renewal



Navigator

B Increase your revenue

Multi-channel campaigns

Our full-service engagement includes...

- ◆ Onboarding postcards & email, branded
- ◆ In-bound call, email & text support team for Medicaid, billing, scheduling, etc.
- ◆ Handwritten birthday cards
- ◆ Pre-AEP medicare education

...and can focus on call-to-actions:

- ◆ Schedule first visit / annual wellness visit
- ◆ Set up 90-day mail order
- ◆ Order with over-the-counter card



B Increase your revenue - case study

AEP Retention Campaign

Reduce churn during AEP and grow your panel for next year

◆ Personalized outreach

We send agent & provider-branded AEP materials to maximize response rate.

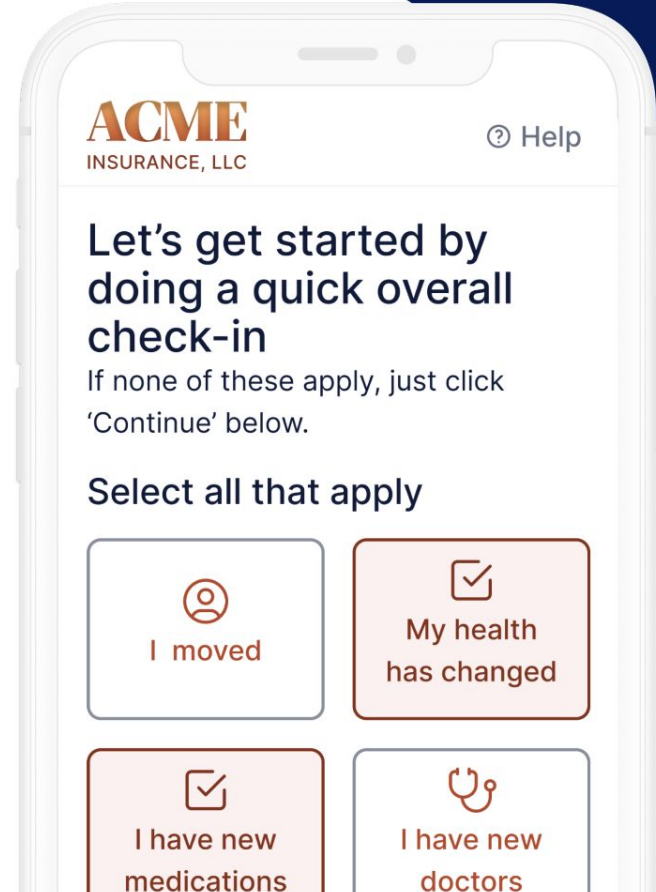
◆ Multi-channel plan reviews

We collect digital & telephonic responses and conduct plan reviews.

◆ Local agent support

You get an experienced independent agent to handle the enrollment.

➔ Survey can drive post-AEP follow up



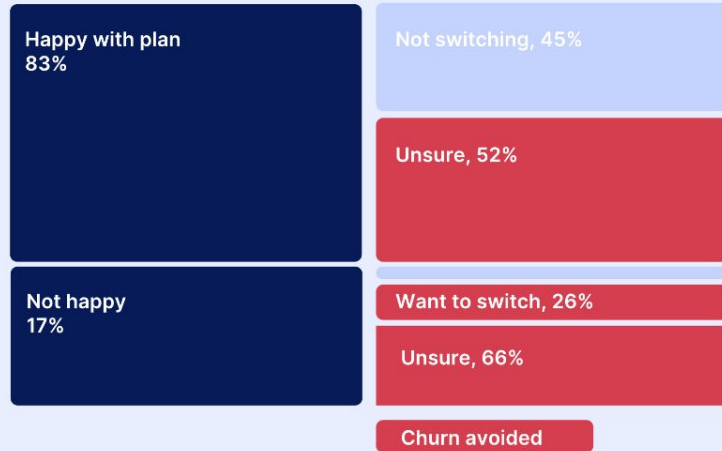
B Increase your revenue - case study

AEP Results

Reduced churn for 60% of members engaged in the campaign, which saw 15% member completion rates of a 25 question digital survey.

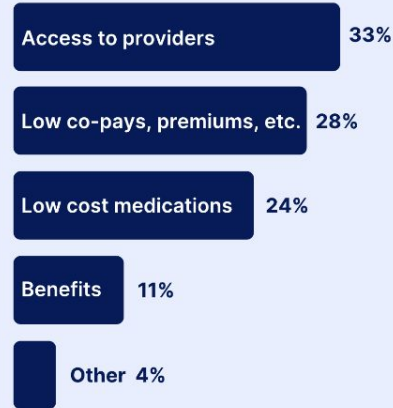
Educating & retaining clients at risk of churn

Members saying...



Generating insights for recommendation & post-onboarding support

What members **like** about their plan...



Members considering these benefits...



➔ 97% completed campaign via web-app, 3% via inbound Navigator call

➔ 15% campaign completion rate (~15min across 25 questions)

© Improve patient satisfaction

Improve member **satisfaction**

I build my business off of my loyal clients, and you off of your happiest patients. Keep them happy, coming back, and referring others with the surprise aha moments.

95%

Member Satisfaction

◆ (Spark CSAT score, measured following a live or email interaction)

Delight your clients with:

- ◆ Case support for administrative healthcare issues
- ◆ Helping them use their Medicare Advantage benefits



© Improve patient satisfaction

Examples of typical cases we resolve

Our Navigator team quickly responds to questions and supports with reviewing plan benefits, conducting calls with carriers, and confirming appointments.

➔ 0.65 day case resolution time

Case 1

Benefit support

Member

Sex: F | Age: 86 | Plan: MAPD (HMO)

Problem

Member wants to know if her plan covers hearing aids and if she can get them without many tests as she is looking to minimize costs.

Follow up

Navigator informed member we would review her benefits and give a call back.

Resolution

1. Reviewed EoC to confirm hearing benefits.
2. Navigator called carrier to confirm missing detail regarding payment flow for hearing aids.
3. Navigator followed up with member via call.

➔ 95% average CSAT

Case 2

SNF selection

Sex: F | Age: 70 | Plan: MAPD (HMO)

POA informed the member will need to go to a skilled nursing facility. POA could not contact facility and needed to find a nursing home.

Navigator researched facilities via carrier website and sent shortlist to the POA.

1. A facility on the shortlist approved the member and admitted her. They offered to assist with finding a long term nursing facility.
2. Assigned agent to review other plan options.
3. Agent & POA agreed to keep the current plan.

Help your patients use **their benefits**

Medicare Advantage plans come with a lot of benefits, but red tape to go along with it. My team helps your patients navigate their plan, understand their benefits, and use them regularly.

Our 30 / 60 / 90 day onboarding plan sets patients up with their over-the-counter-card and medications.



Dental



Transportation



Over-the-Counter Card



Hearing Aids



Eyewear



Financial Assistance

Secured in a HIPAA-compliant Medicare CRM

Our proprietary platform powers our engagement and Navigator capabilities. It stores PHI compliantly and requires signed BAAs for every user.

It captures structured policy, physician, medication, pharmacy and general Medicare and Medicaid data.

◆ Single source of truth

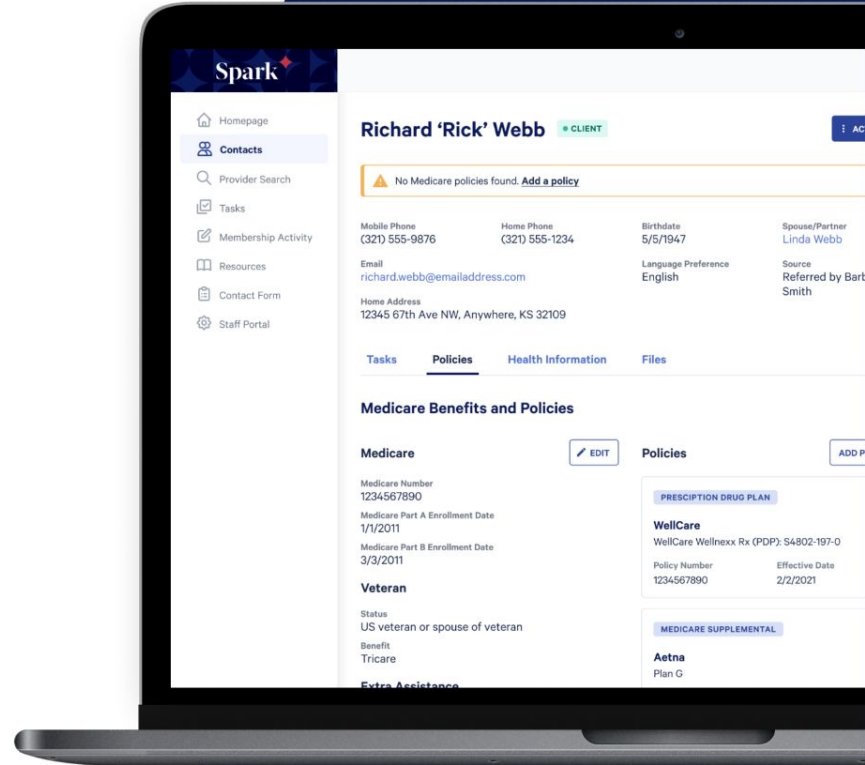
Add policies, beneficiaries, medications, providers, and client service activity.

◆ Enrollment & doctor lookup

Quickly find in-network doctors, quote, and enroll patients into Med Advantage plans.

◆ Full visibility

See exactly what's being mailed and emailed to patients.



How we can work **together**

Initial partnership:

- ◆ First white-label marketing campaign free
- ◆ Standard post-enrollment engagement campaigns

Full partnership:

- ◆ Exclusive agency partner (existing agent partners can join my team to benefit from our full system)
- ◆ 50/50 marketing co-op
- ◆ Service agreement to provide customized apt scheduling, case support, AWVs, etc





[First] [Last]

[Company]

[Email]

[Phone]



This QR will give you quick access to the referral page and is compliant with Medicare guidelines.

Thank You