Think Agent™

Retail

What is the Retail opportunity?

The Retail program is an opportunity to work together in building a prospect pipeline to increase sales year-round.

The Retail program provides access to high-traffic retail locations and is low cost for the agent.

Cost efficient retail bundles are competitively priced and drive a consistent look and feel across all events.

Agents who adhere to the program are given $100 in Medicare Marketing Studio credit post-AEP! ** 90% adherence must be achieved.*

Contact your local Broker Manager to get started!

Medicare
RETAIL SALES & STRATEGY

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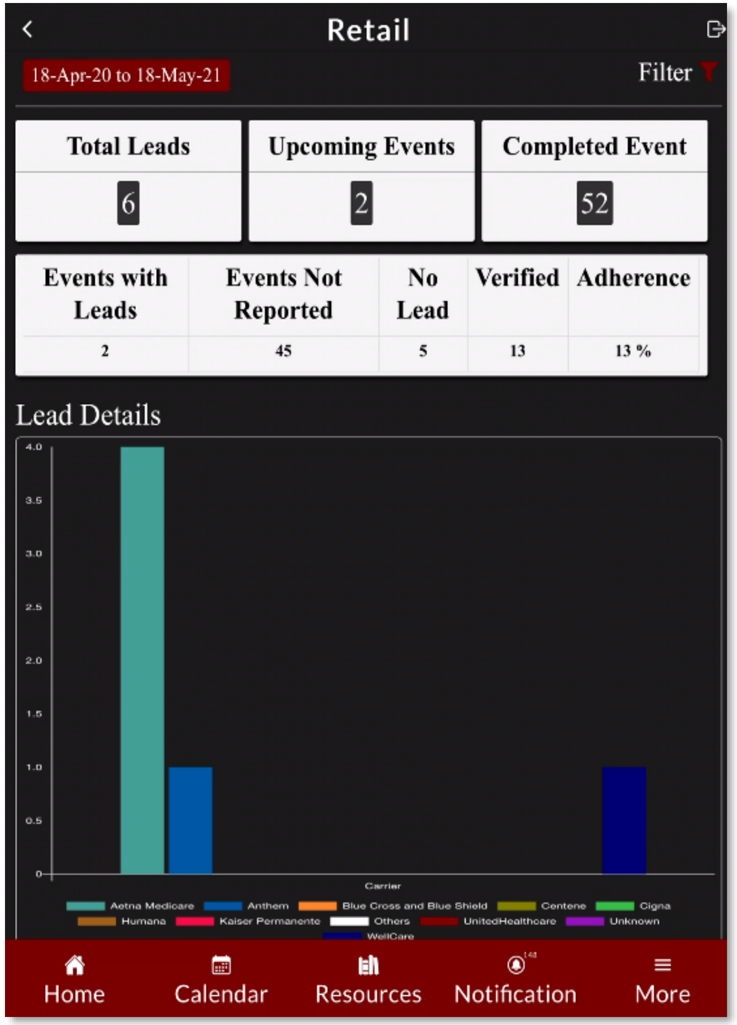
Your Retail home screen dashboard



The Retail events and leads dashboard is a high-level view of activity.

Filtering date-ranges will adjust the entire dashboard.

The first component will show the agent: **Total Leads**, **Upcoming Events** and **Completed Events** for all their Retail activity.

The second component will aggregate **Events with Leads**, **Events Not Reported**, **Events with No Leads**, **Verified Events** and the agent's **Adherence** to the Retail program.

Once Retail leads are added, the third component will graph leads by carrier.

Please see the next page for definitions.

Dashboard definitions

Date Range – the data the dashboard is reflecting.

Filter – adjusts the date range for data.

Total Leads – leads you have reported.

Upcoming Events – the total number of upcoming events.

Completed Events – the total number of events you have completed.

Events with Leads – total events where you received and reported leads.

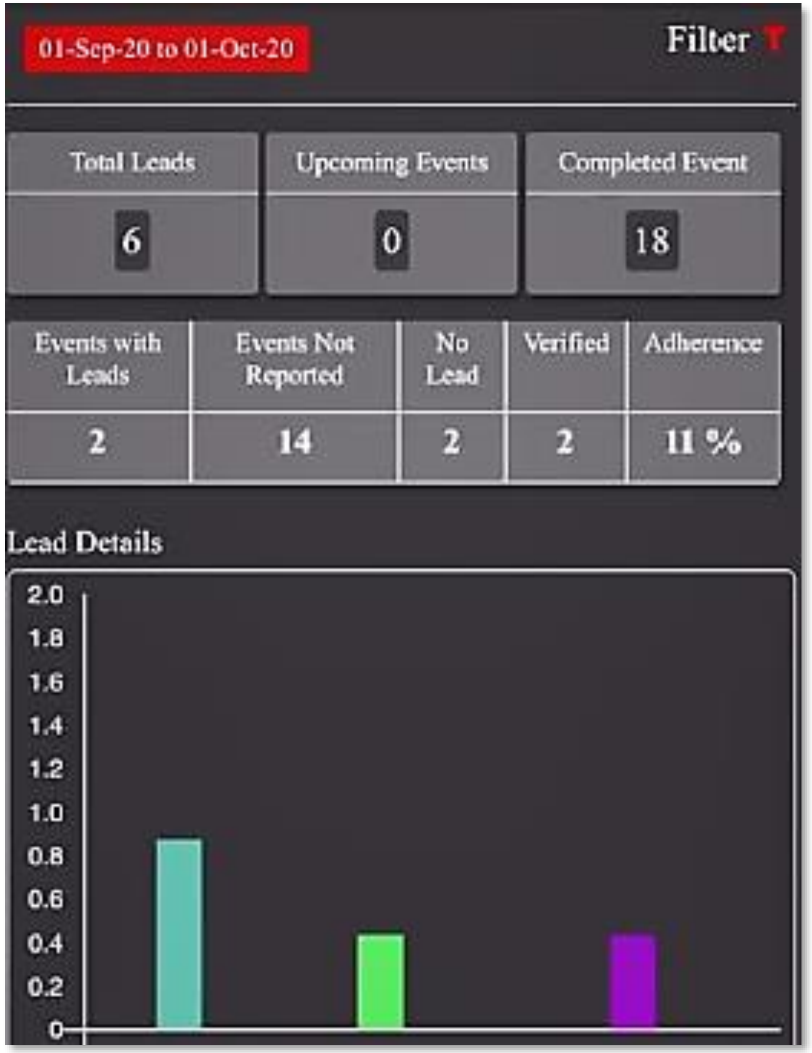
Events not Reported – total events where you did not report leads.

No Lead – total events where you received 0 leads and you clicked the No Leads box.

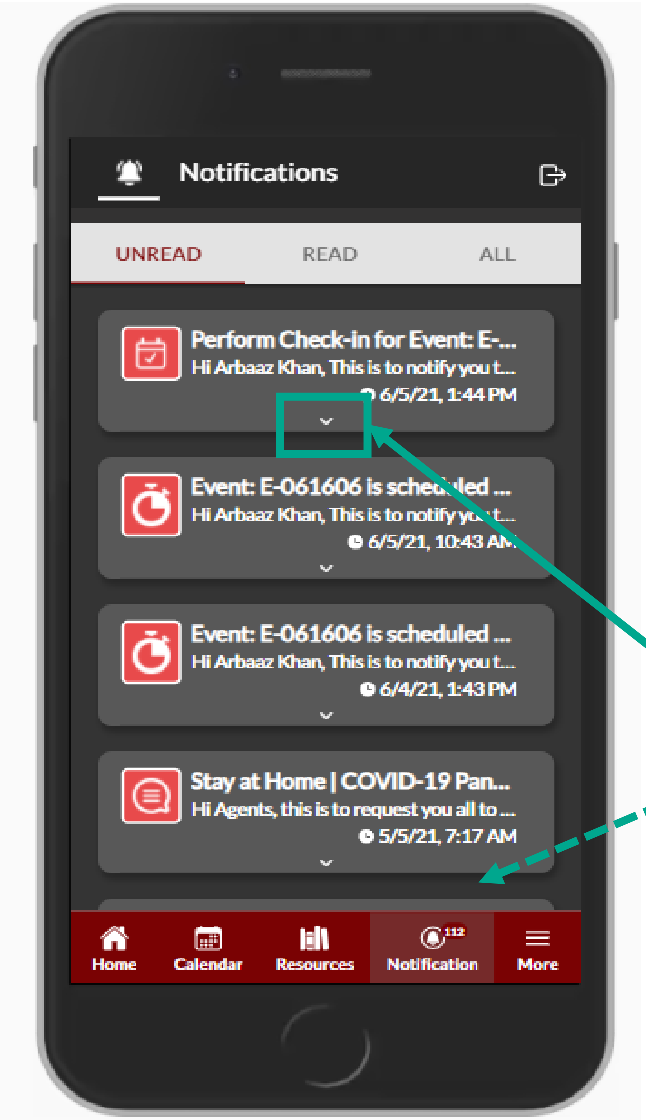
Verified – total number of events you checked in and out of. Think Agent automatically checks you out when you disposition leads.

Adherence – percentage of total completed events you verified and reported leads on.

Lead Details – a bar chart that shows lead numbers reported per carrier.



Retail Notifications



Notifications are important updates regarding events.

Event Check-in reminders remind the agent to check into their events.

Newly Scheduled Events are events you have requested through Think Agent and are now approved and show in your calendar.

Lead Input reminders remind the agent to enter leads on past Retail events.

Pending Events and **Cancellation** request are also visible.

*Click-on a notification's **down arrow** to read more. This will remove it from your list of unread notifications and the Notification tally below.*

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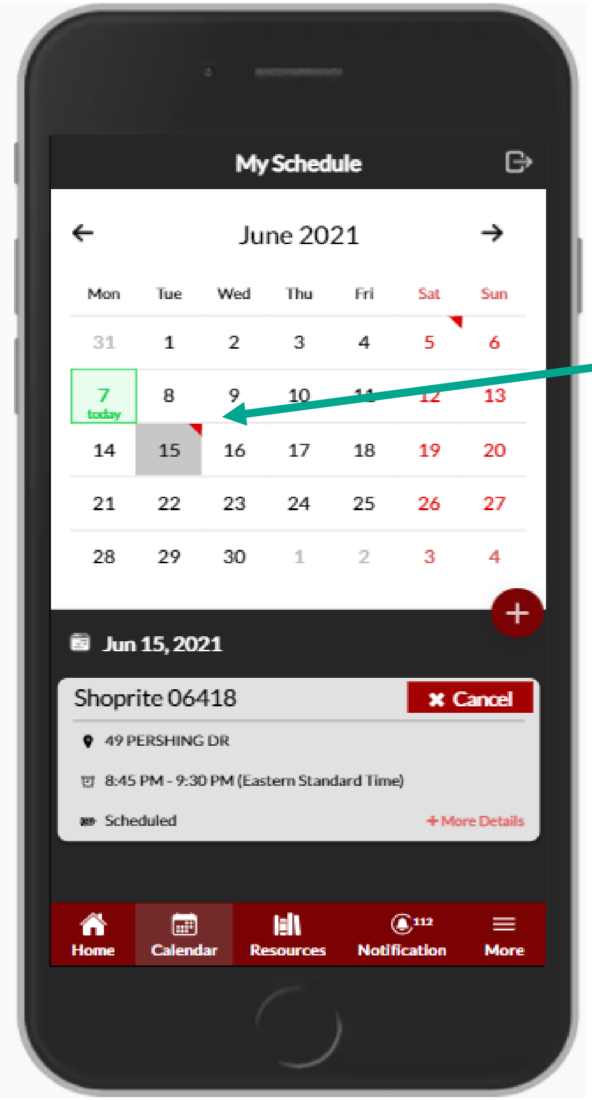
Calendar of Retail Events



Click-on the **Calendar** at the bottom of your Home screen to display your scheduled events.

Scheduled events are notated by a ***red triangle****.*

Event details will display by clicking-on the day. Information about the event will display below the calendar. You will be able to see:

- Event Date
- Retailer Name
- Address
- Event Start & End Time

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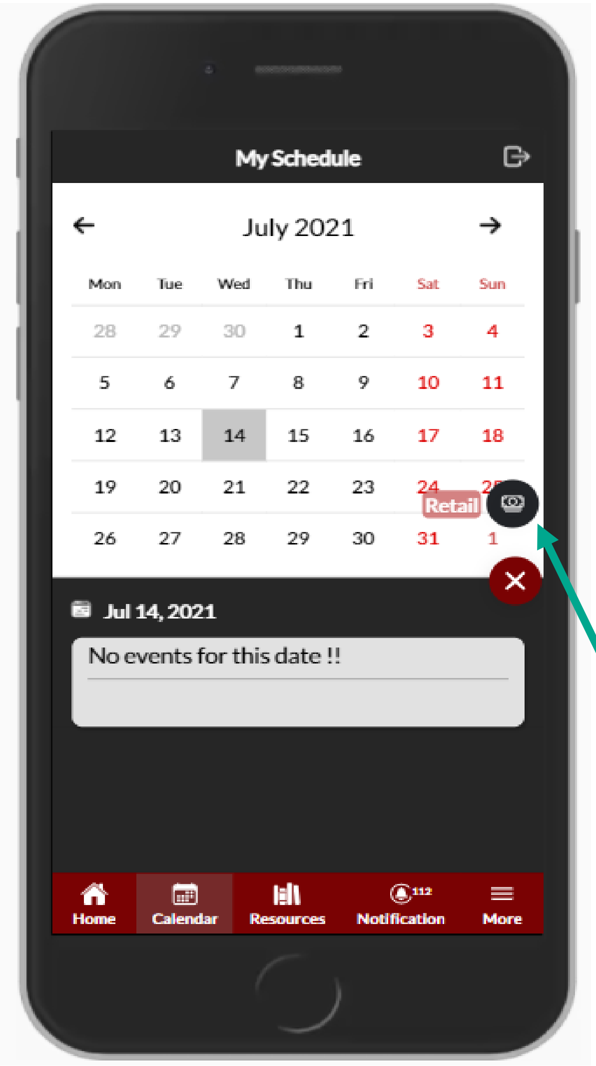
Requesting Retail Events



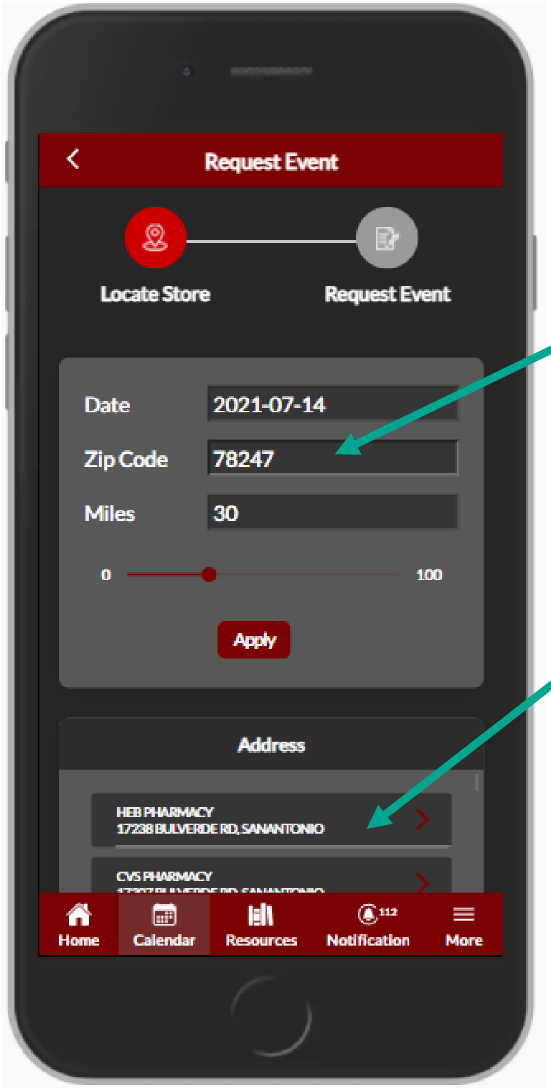
Did you know that you can request Retail events on Think Agent? You can!

Retail events can be requested **18 days in the future**.

To request a Retail event, access your Calendar, select your preferred day and click the **+** sign. You will be presented with the **Retail icon**. Select the icon to advance to the next screen.

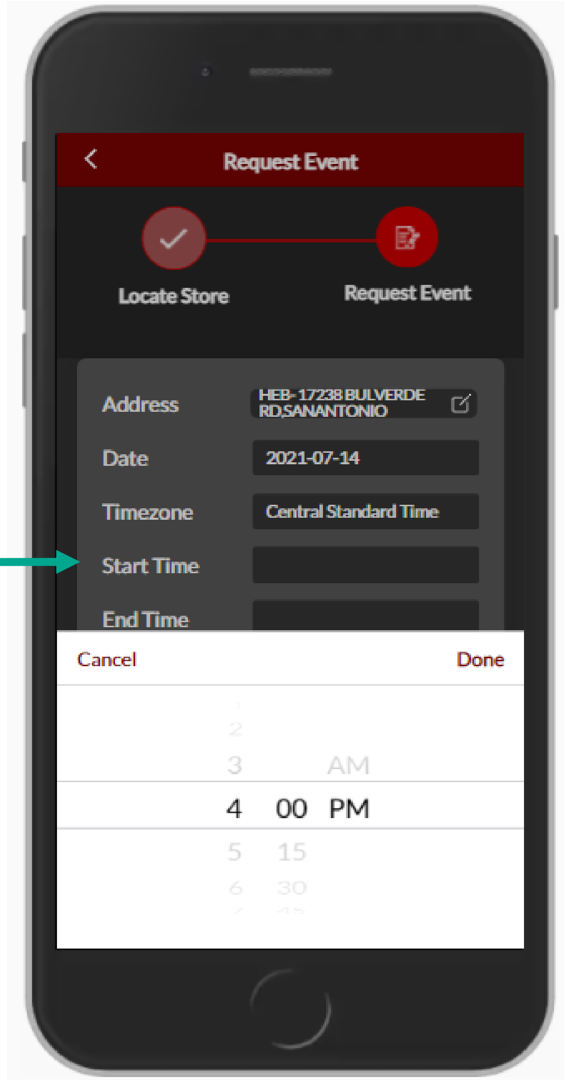
*The Retail icon will appear **black** - As in the image above - if the date is available to submit a request; otherwise, it will be grayed-out.*

Requesting Retail Events



Next, enter a zip code and adjust miles if applicable.

Select your location and enter Start and End Times , then click Submit.



Event requests: What happens next?

HEB 78247
17238 BULVERDE RD
2:00 PM - 3:00 PM (Central Standard Time)
Pending BM Approval

When you submit your event through Think Agent, the event status will state **Pending BM Approval**. Your Broker Manager will have 4 days to review and approve your event submission.

Broker Managers are automatically notified when you submit an event for approval.

Shoprite 6614
250 BARNUM AVENUE CUTOFF
7:00 PM - 11:00 PM (Eastern Standard Time)
BM Rejected

The **BM Rejected** status means that your Broker Manager did not approve your scheduled date and time submission.

Shoprite 06418 ✖ Cancel
49 PERSHING DR
4:30 PM - 7:30 PM (Eastern Standard Time)
Scheduled + More Details

Your event status will change to **Scheduled** when your Broker Manager and the store approves your date & time request.

CVS 32606
4354 NW 23RD AVE
4:30 PM - 7:30 PM (Eastern Standard Time)
Pending Cancellation Approval + More Details

You will see the **Pending Cancellation Approval** status when you cancel a scheduled event through Think Agent. Your Broker Manager has 2 days to process your cancellation request.

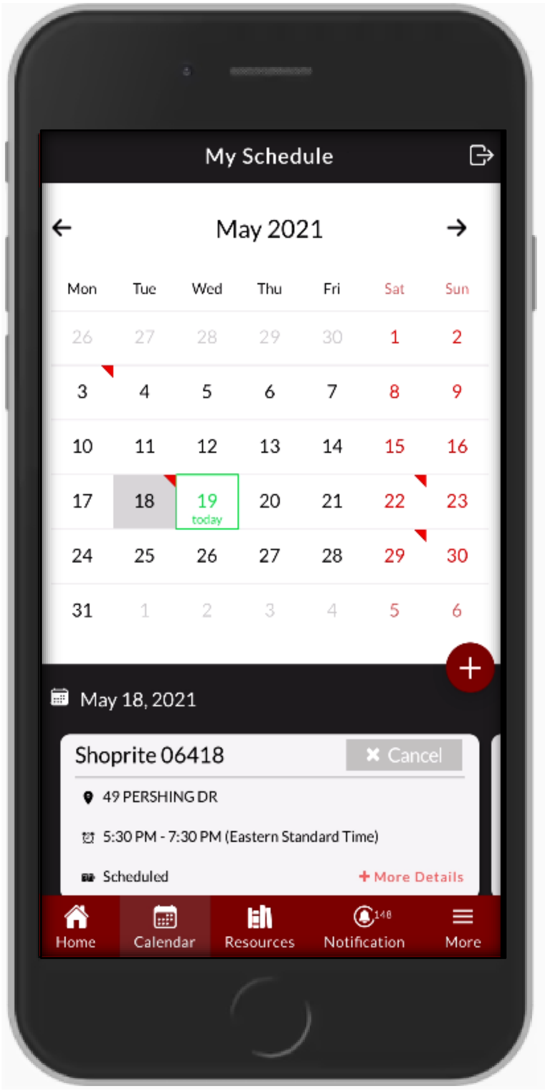
CVS 15236
5242 CLAIRTON BLVD
11:00 AM - 12:00 PM (Eastern Standard Time)
Rejected by Store

Rejected by Store means that the store rejected your event submission because the store had no availability to have you there.

Shoprite 6484
875 BRIDGEPORT AVE
9:00 AM - 10:00 AM (Eastern Standard Time)
Request Sent to Store

Your event status will change to **Request Sent to Store** once your Broker Manager approves the event.

Manually checking-into your event



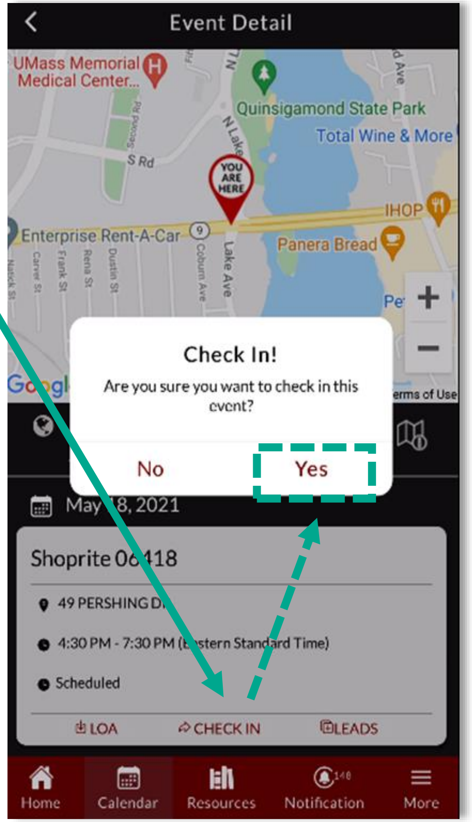
To check-into your event, select today's date on the calendar and select **+ More Details** on the event card.

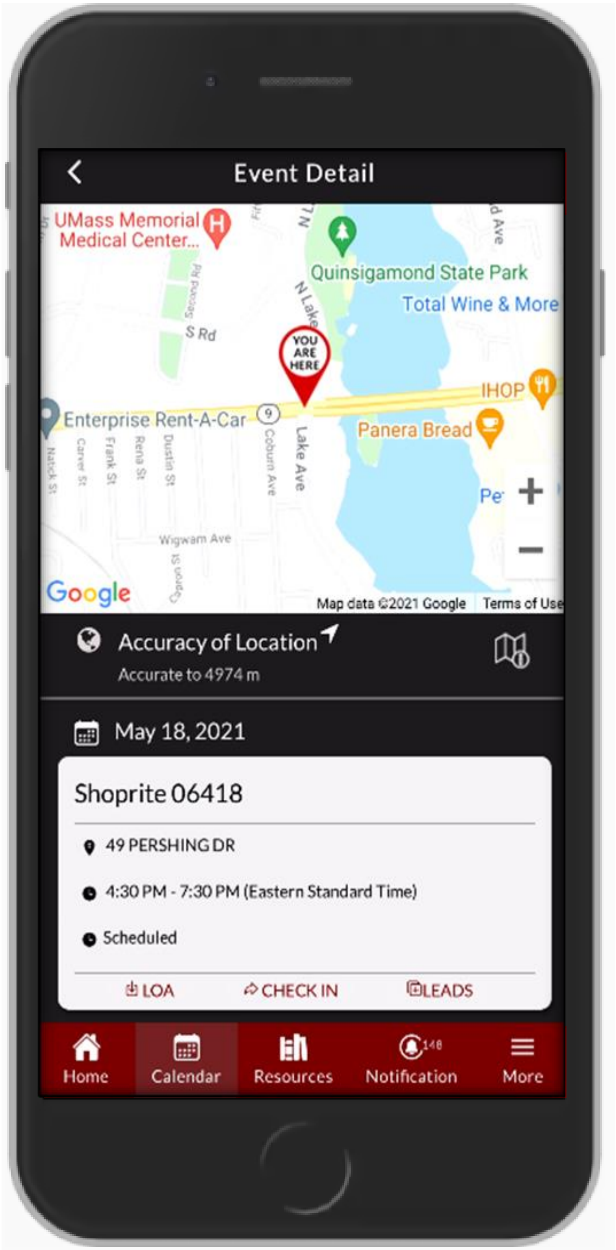
You can check-in to an event 30-minutes before the event Start Time.

A pop-up notification will present and ask you to confirm you want to check-into the event. Select **Yes**.

After your event, please come back to Think Agent and add your **leads**.

Adding leads will automatically check you out of your event.





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Retail Letter of Authorization (LOA)

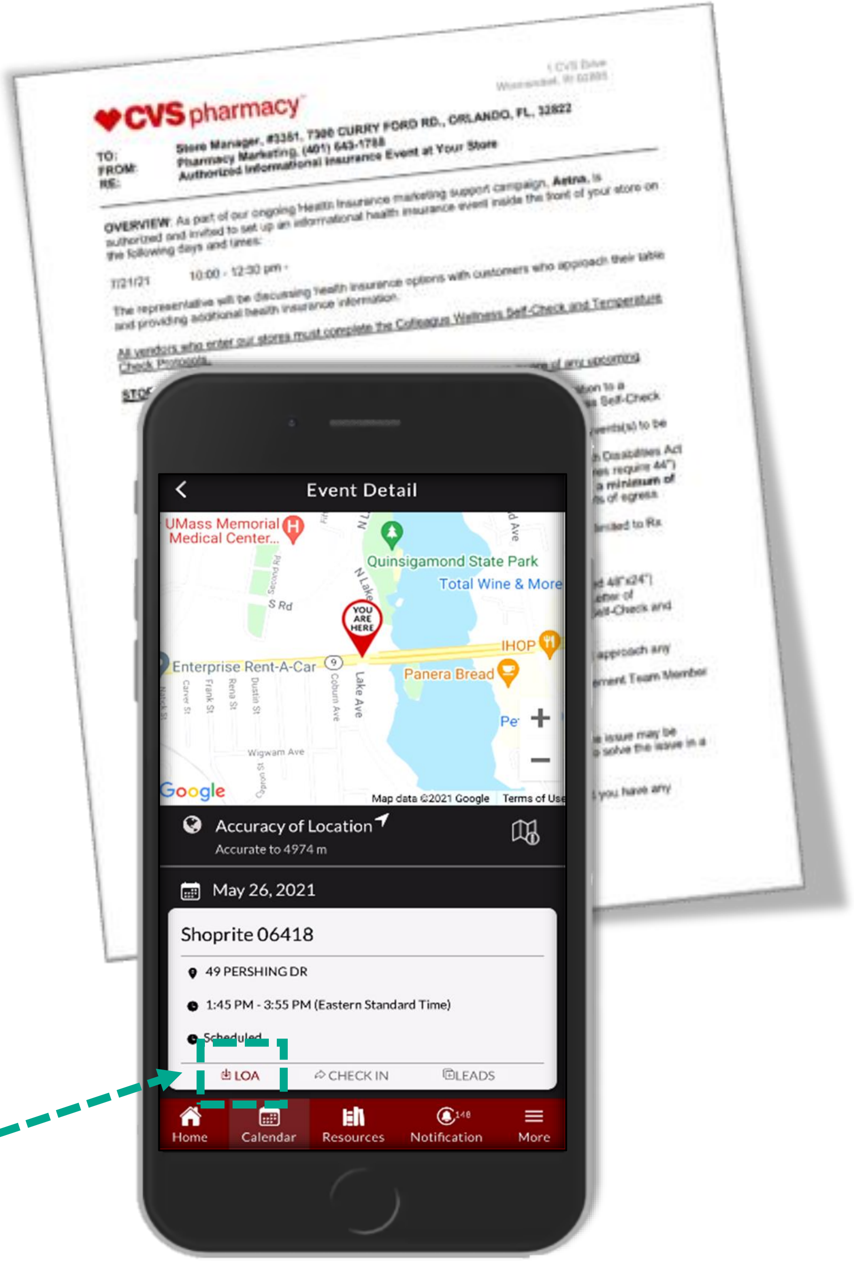
A **Letter of Authorization** or **LOA** permits you to conduct an event at your scheduled location. CVS Health requires a LOA for every event you conduct.

Present this LOA to any store personnel when you first meet with them, and on the day of your event.

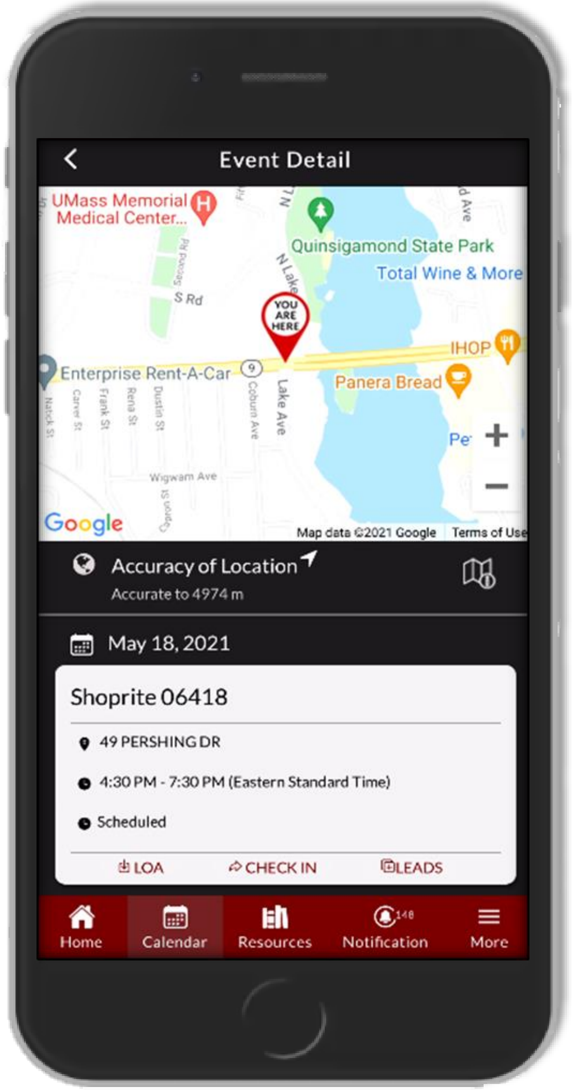
There is a CVS Health phone number on the LOA that the store can use to contact if there are any questions.

To find your event LOA, click the Calendar on your home screen, then the date of your scheduled event, find your event in the gray box below the calendar, then click-on More Details and **click LOA**.

If you have the Adobe application on your mobile device, the LOA will open as a PDF, and you will have the option to download or print PDF.



Retail leads



Recording leads automatically checks you out of your event.

Lead documentation is an important component of participation in the Retail program.

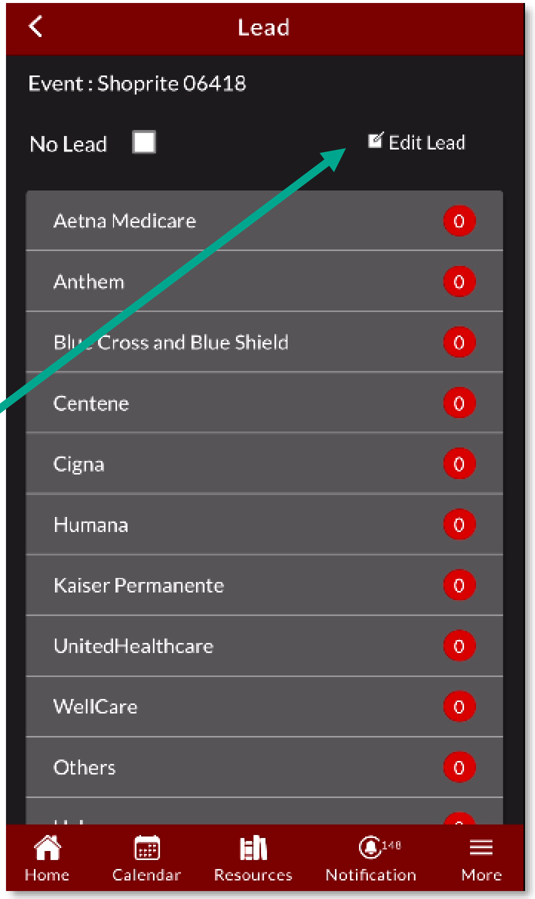
To document leads, select **Leads** on the event card. The lead template will open.

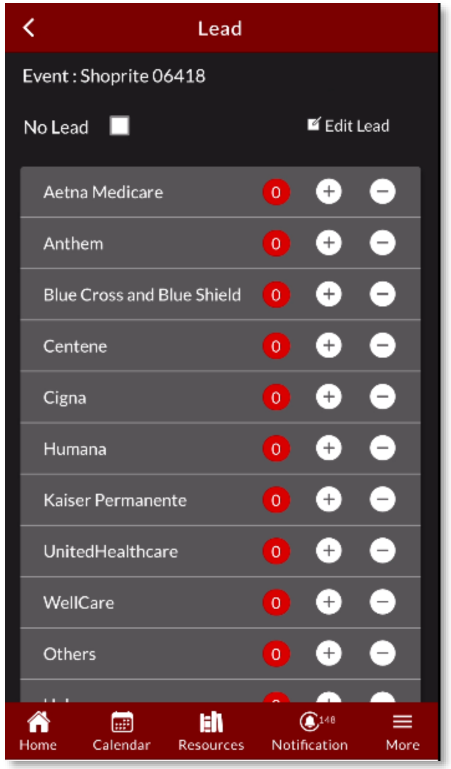
To add leads, please select **Edit Lead**.

Click the **+** sign by the name of the carrier.

Your changes automatically save! You are now checked out of your event!

You will have 30 days to add leads to your event. You will receive push notifications for events that require lead entries.





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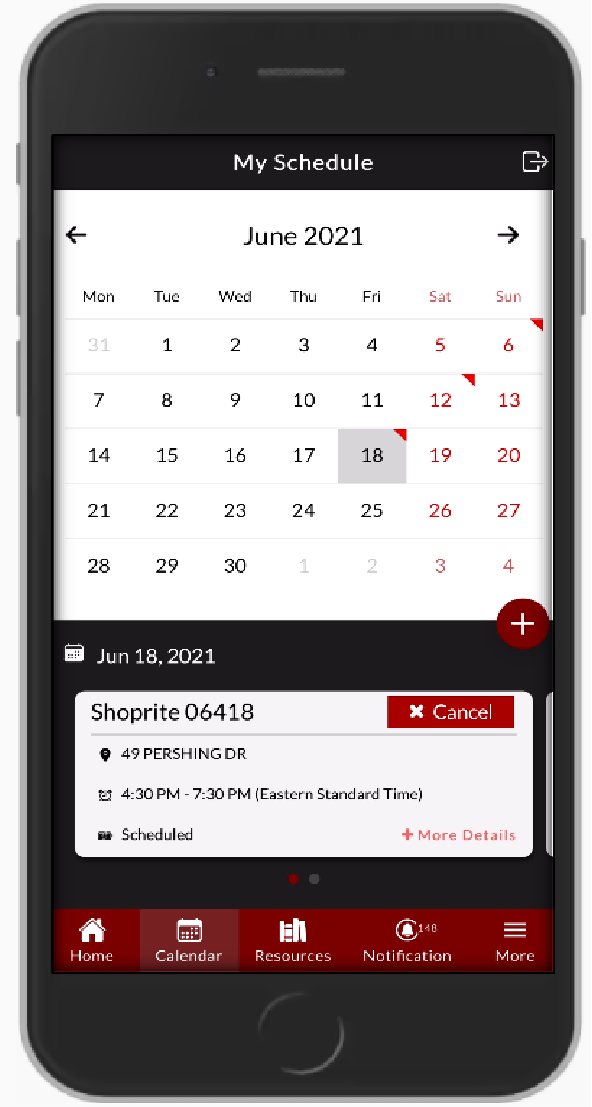
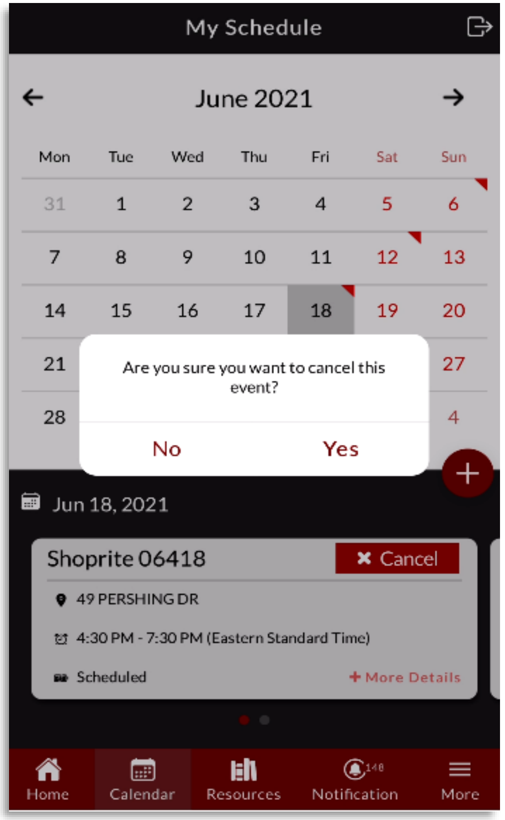
Retail event cancellations





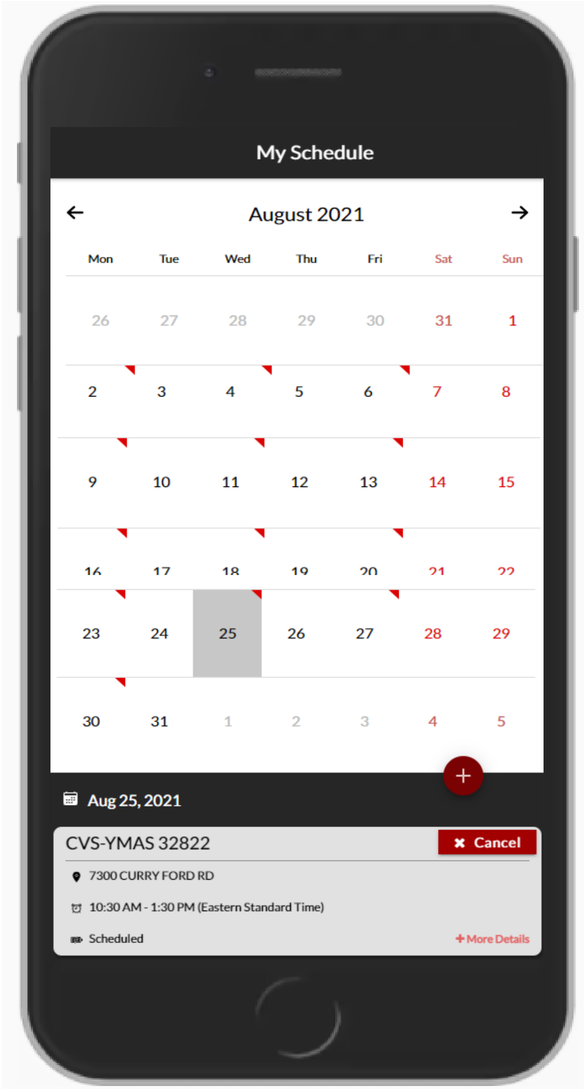
Did you know that you can cancel events on Think Agent? You can!

To cancel your event, navigate to the day on your calendar and select **Cancel** on the event card.

A pop-up will present and ask if you are sure you want to cancel the event. Select **Yes**.

Event cancellation timelines align to each retailer and CMS-imposed guidelines. We generally recommend you give yourself 5-days to be safe and always notify your Broker Manager!

Retail event cancellations

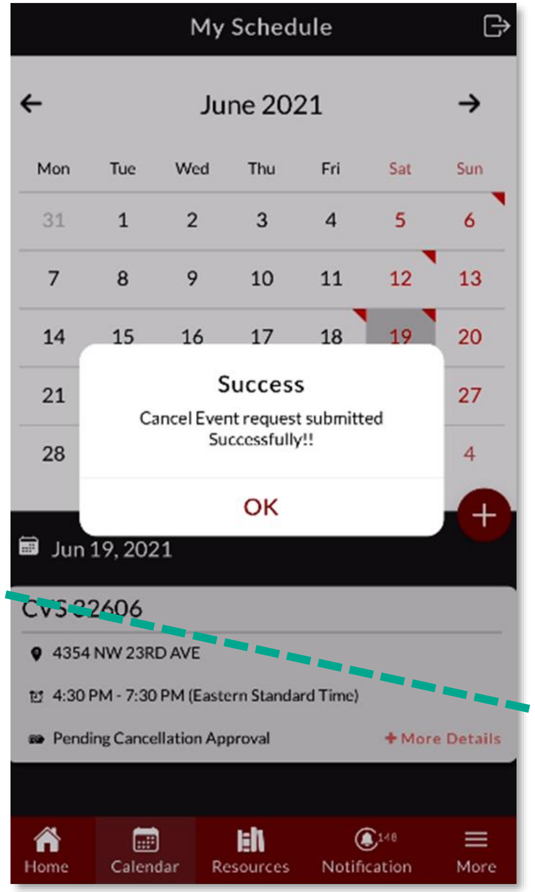


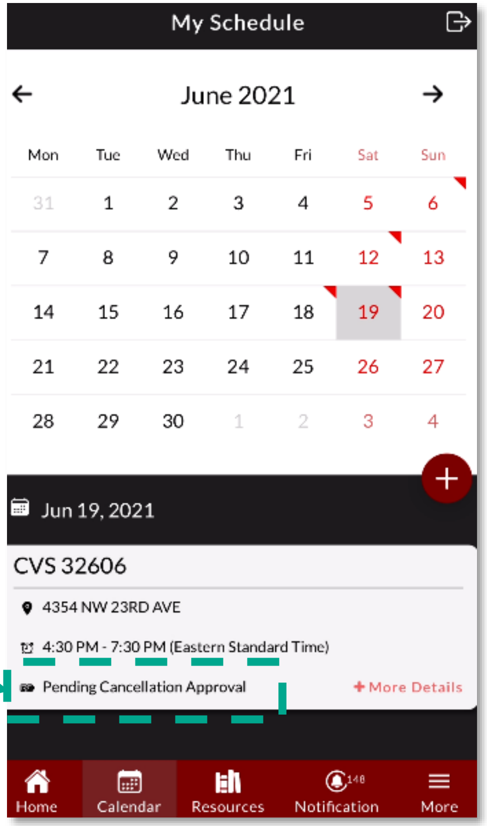
In order to process an event cancellation, you will need to provide a **reason** for the cancellation.

Once you have submitted your reason, a pop-up will present to confirm your event cancellation request has been processed.

Your Broker Manager will automatically be notified of the cancellation request and will have 2 days to approve.

Your event status will reflect **Pending Cancellation Approval** until the request is approved.





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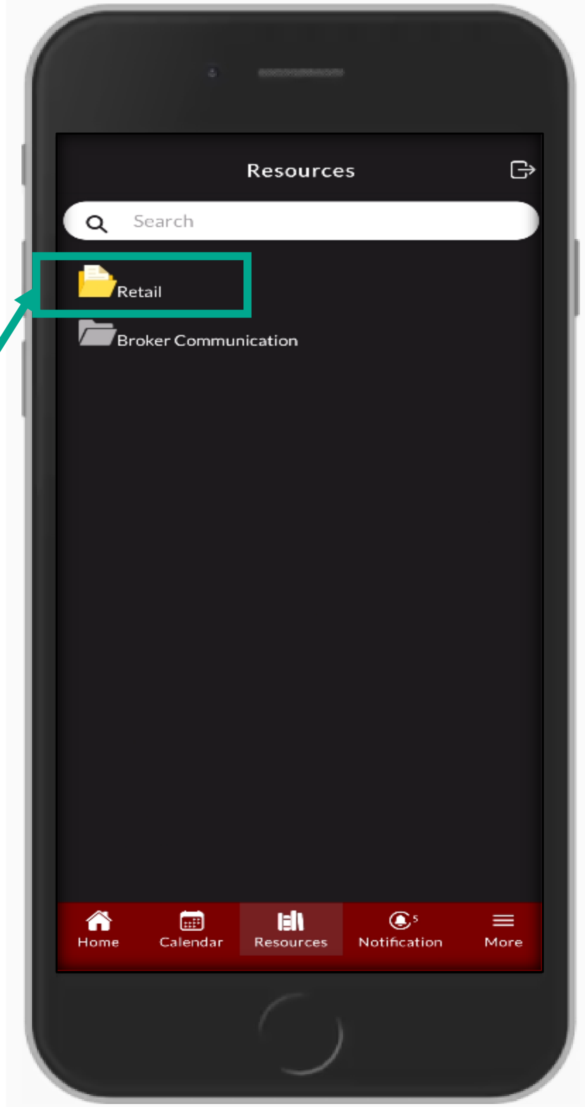
Retail resources

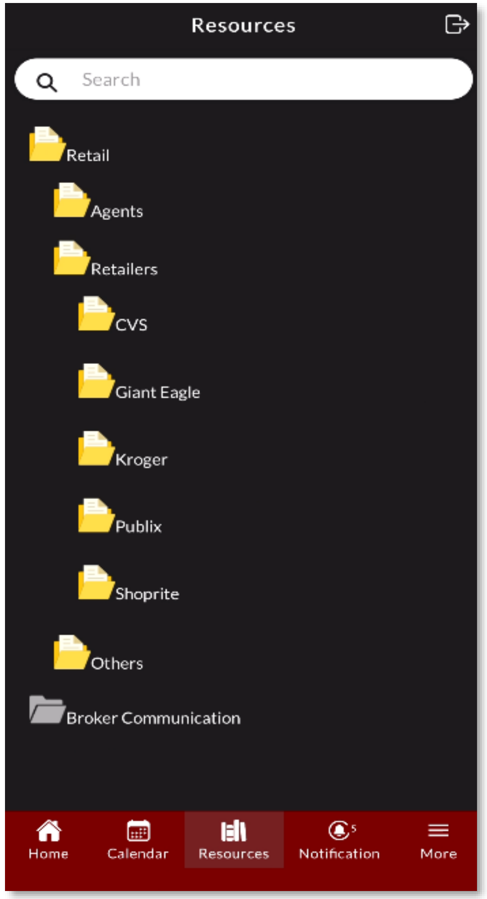
Resources are materials and/or guidelines that are used in support of the Retail program.

In the Retail resources folder, you can find:

- Event Verification Forms
- Lead Template
- Retail Blackout Calendars
- Best Practices
- User Guide

Double-click to open a folder.





Retail overview summary

In this guide, we covered each of the following:

- To get started with the Aetna Medicare Retail program, agents must first be RTS Aetna MAPD products, and have registered to the Think Agent application.
- The Retail dashboard is your source to review all Retail events, Retail leads, and program performance.
- Retail notifications are comprehensive and keep you updated on event requests, check-ins, and recording leads – And more!
- The Retail calendar is a fantastic means of keeping track of events, past, present and future.
- Requesting events is simple and Retail events can be requested 18-days or greater in the future.
- Checking-in to your event is allowed 30-minutes before the event start time, and requires access to a Wi-Fi signal, and proximity to the event address.
- The event LOA is your and the retailer's confirmation of your permission to be in the store, and is always available under each scheduled event.
- Recording Retail leads for any carrier is required for Retail program adherence, and can be done 30-days after the event date.
- Always contact your Broker Manager before cancelling a Retail event.
- Retail resources are available in the Think Agent resources folder, and our support team is available for assistance at **support@thinkagent.com**.

Thank You!

Think Agent™