



Retention Toolkit

Open Enrollment 2026



Broker Retention Playbook

Retention Playbook Content

Broker Playbook Intro

Client Outreach Email Template

Phone Script & Talking Points

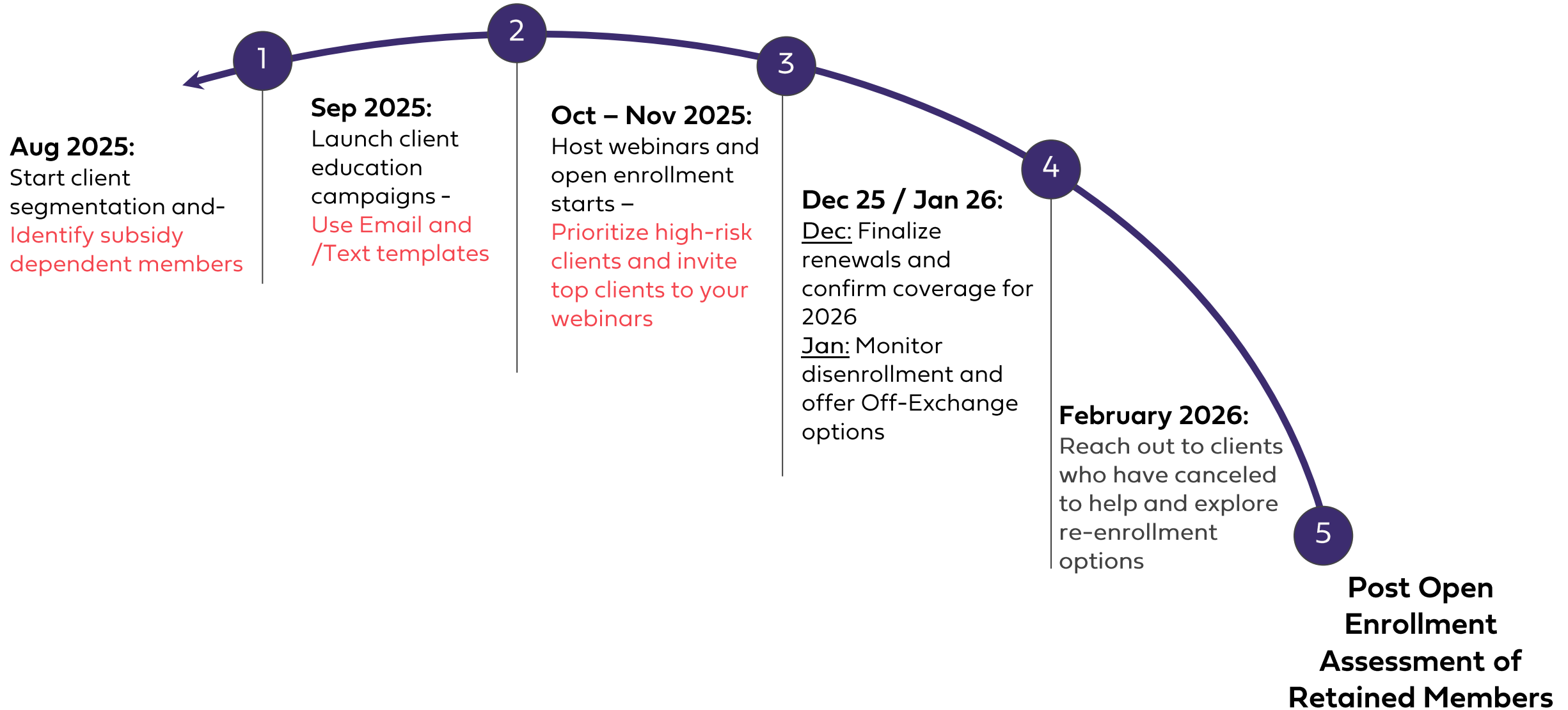
Coverage FAQs for Your Members

Broker Retention Checklist

Broker Plan Downgrade Matrix (Tool)



Broker Retention – Engagement Calendar



Empowering Brokers: Tools to Support Member Retention

Retention efforts are rooted in building client trust and providing consistent, reliable support.



Plan Details

[PPO Plans](#)[HMO Plans](#)[Dental/Vision](#)

Broker Retention Playbook

Instructions: Click on the boxes with blue title text below to download each playbook document

Broker Retention Playbook – Open Enrollment 2026

This playbook provides **five ready-to-use documents** that brokers can edit and use to help clients find affordable health insurance options and **persuade them not to go uninsured** (especially in California's individual market). Each template focuses on strategies to keep clients covered amid upcoming changes (like those from the One Big Beautiful Bill Act and ACA adjustments).

Plan Comparison & Savings Sheet

Visual matrix of current vs. lower-cost plan options (shows monthly & annual savings).

Client Outreach Email

Template email encouraging clients to review affordable plans instead of dropping coverage.

Phone Script & Talking Points

Step-by-step call guide with key messages and Q&A for common client objections.

Coverage FAQs for Clients

One-page Q&A handout addressing typical questions/concerns about staying insured.

Broker's Retention Checklist

Internal checklist to plan and track your client outreach and follow-ups during Open Enrollment.



Running Reports from Your Broker Portal

blue california | broker connection

Individual & Family ^ Medicare v Small Business v Large Groups v Resources v

INDIVIDUAL & FAMILY

- View All Submitted Applications >
- Access Client List >**
- Start Enrollment >
- Broker Training Webinars >
- News & Announcements >

Individual & Family Home >

Medical Plans >

Select to change dashboard view

Line of business
Individual & family plans v

Set as default

Clients

View my clients >

Manage payments >

Enrollment

Start enrollment >

Check application status >

blue california | broker connection

Individual & Family v Medicare v Small Business v Large Groups v Resources v

Client List

Data Update Details

Payment FAQ

Individual & family Medicare Small Business

Show Filters

Showing results 1 - 10 of 79

Download client list

Click on "Download Client List" to generate a Microsoft Excel list of members with their detail information

of records 10 v Expand A

Alert	Payment status ⓘ	Name	Subscriber ID	Plan	ID card ⓘ	Subscriber type	Manage payments ⓘ
N/A	CURRENT	LISA	91420	Silver 73 PPO Jan25	Get ID card	IFP ON EXCHANGE	Set up autopay or Make a payment v
⚑	CANCELLED	TETIANA	91408	Family Dental PPO Plan	N/A	IFP ON EXCHANGE	Set up autopay or Make a payment v
N/A	CURRENT	DARRELL	91414	Silver 87 PPO Jan25	Get ID card	IFP ON EXCHANGE	Set up autopay or Make a payment v





Thank you