Retention Toolkit

Open Enrollment 2026

Broker Retention Playbook

Retention Playbook Content

Broker Retention – Engagement Calendar

1. **Aug 2025:**
Start client segmentation and- Identify subsidy dependent members

2. **Sep 2025:**
Launch client education campaigns - Use Email and /Text templates

3. **Oct – Nov 2025:**
Host webinars and open enrollment starts – Prioritize high-risk clients and invite top clients to your webinars

4. **Dec 25 / Jan 26:**
Dec: Finalize renewals and confirm coverage for 2026
Jan: Monitor disenrollment and offer Off-Exchange options

5. **February 2026:**
Reach out to clients who have canceled to help and explore re-enrollment options

Post Open Enrollment Assessment of Retained Members

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).

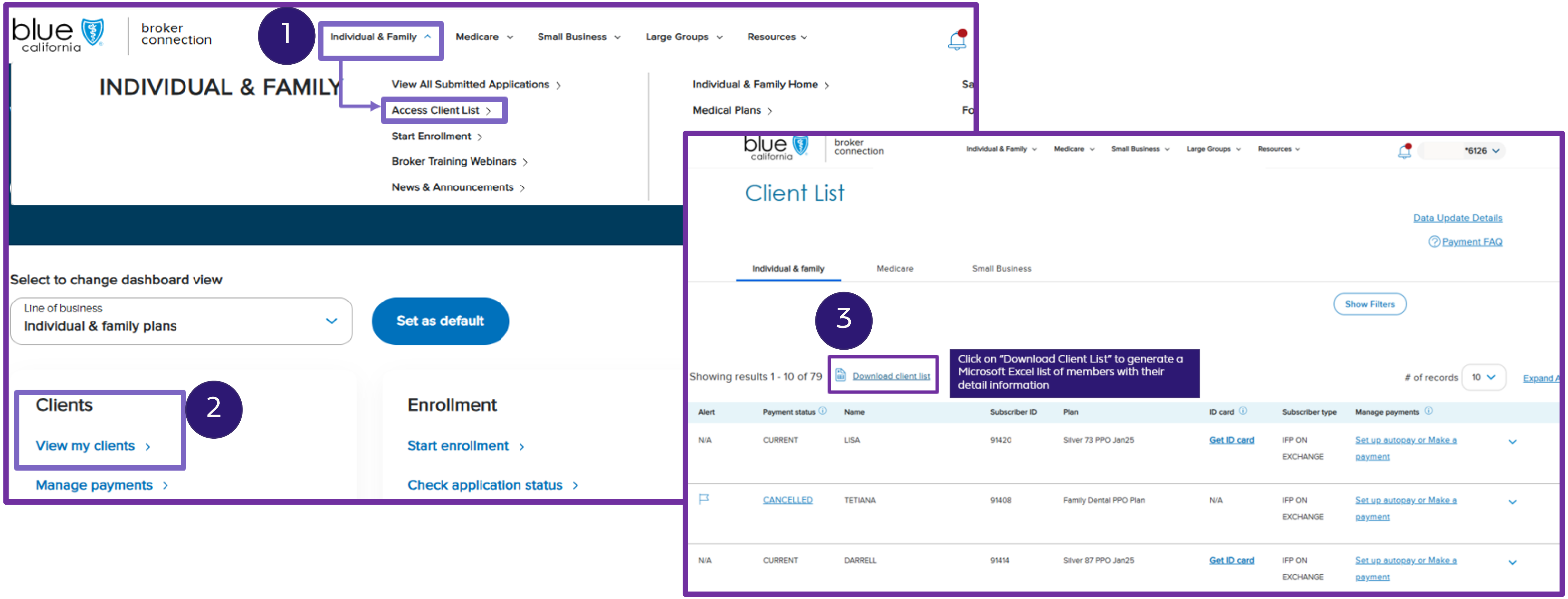
Client Outreach Email
Template email encouraging clients to review affordable plans instead of dropping coverage.

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



Thank you