

Formal Marketing/Sales Events

Formal marketing/sales events are typically structured in an audience/presenter style with a sales person or plan representative formally providing specific plan sponsor information via a presentation on the products being offered.

Agents Must

1. Complete and pass the Events Basic module. Pay close attention to the things you are required to state aloud during your event.
2. At the beginning of the event, clearly announce your name, your title, the company you represent, and the product that will be formally presented.
3. Complete a full, formal sales presentation even if only one consumer or representative of a consumer attends.
4. Structure the event in a presenter/audience type style.
5. Report all marketing/sales events to UnitedHealthcare according to event reporting policies and procedures.
6. Use only plan approved/CMS approved materials
7. Have an enrollment kit available for all attending consumers. This ensures you will have the required materials available for explaining the plan accurately to a consumer.
8. If the plan includes prescription drug coverage, review the prescription drug benefit including, formulary, pharmacy network, copayments, coinsurance, tiers, coverage gap, and catastrophic coverage.
9. Host the event at a public venue.
10. Make sure you explain to consumers, how they can confirm provider network status and offer to help them with this after the event.
11. Specify where the Plan Star Ratings and Multi-Language Insert are located in the Pre-Enrollment Sales Kit.

Agents Must Not

1. Cross-sell by promoting or displaying materials for non-health related products at marketing/sales events.
2. Offer a meal or individual snacks that could be “bundled” as a meal.
3. Make any inappropriate, inaccurate, misleading, or superlative statements.
4. Use scare tactics or statements that may be interpreted as scare tactics.
5. Fail to be present or have a plan representative present at any event filed and not cancelled in bConnected within three business days of the event.
6. Advertise a personal/individual or marketing/sales event as educational.
7. Provide gift cards, gift certificates, or cash giveaways.
8. Conduct health screenings or other like-activities.
9. Request or accept a referral
10. Restrict event admission to an exclusive organization membership list or specific social group.