

Group Health Marketing Program

Create a **Group Health Marketing Folder** on your desktop and download the following files from the **presentations** link on the iezquote.com website home page.

File 1	Group Health Marketing Plan
File 2	Group Health Prospecting Dialog
File 3	Email Letter with Video Link
File 4	Instruction Email for Employee List
File 5	Employee List
File 6	Assurant Employer Participation Agreement
File 7	Idaho Group Employee Enrollment Form
File 6	Fidelity Security Employer Enrollment Form
File 9	Fidelity Security Employee Enrollment Form

- Step 1** Contact potential client using the **Group Prospecting Dialog**. Have client commit to review the video presentation by the next business day.
- Step 2** Send your client the **Email Letter with Video Link**. Contact your client the next business day to answer questions.
- Step 3** If your client would like a preliminary quote, send them the **Instruction Email for Employee List** and attach the **Employee List** file. Have client fax you the completed Employee Health Coverage List with a copy of their present Group Healthcare Plan by the next business day.
- Step 4** Forward this information to Blake at Simmons Benefits. Fax No. 208-522-2371. Call Blake to discuss your competitive proposals. (Plan type, deductibles, coinsurance, 1st dollar benefits, etc.) Blake's direct line is 208-227-1651. He will prepare plan proposals and fax or email them to you.
- Step 5** Present preliminary quote to your client. If your client would like a final quote, complete an **Idaho Group Insurance Employee Form** for each covered employee and fax them to Blake for underwriting and a final quote.
- Step 6** To close the sale complete the following forms and applications;
Assurant Employer Participation Agreement
Idaho Group Employee Form for each employee
Fidelity Security Employer Enrollment Form
Fidelity Security Employee Enrollment Form for each employee.
Collect two checks. Payable to Assurant Health for Major Medical Premium and Fidelity Security for First Dollar Group Supplement
- Step 7** Enjoy your commissions

Note: To download the GAP 360 Presentation file, log into IEZ Quote, click on Software/Mobile Office Updates under the Navigator (yellow area) and scroll down until you see the link "GAP 360 Presentation". RIGHT click on it and select the command "Save Target As...", then in the dialogue box that comes up, select one of your folders or your Desktop and save it. You can then run the presentation from your computer without having to be connected to the Internet. You can also burn it to CDs for distribution to your clients.