

TEMPLATETITANHQ

Client Retention Power Pack

The complete client-keeping system for Medicare agents

2026 EDITION

Professional Templates. Zero Guesswork. More Closed Business.

Welcome to Your Retention System

You're holding the complete client-keeping system for Medicare agents. New enrollments are expensive and risky; the clients you already have are your most profitable asset — IF you keep them. These five tools, used together, make sure you do.

Why retention beats prospecting:

Keeping a Medicare client protects ~\$300–\$600 in renewal commission every year — with no ad spend, no chargeback risk, and a referral pipeline on top. Agents who run a calendared retention system simply out-earn the ones chasing only new business.

What's in your Power Pack

Tool	Use it to...	When
New-Client Welcome Packet	Onboard new clients so they never get clawed back	The moment they enroll
Client Touchpoint Calendar	Stay top-of-mind all year with done-for-you messages	Every month
ANOC / Plan-Change Explainer	Turn the confusing September letter into a booked review	Sept–Oct
Annual Review Kit	Run the review that keeps the client at renewal	AEP / renewal
Client Referral Engine	Turn happy clients into your best lead source	Right after a review

The full client lifecycle (how they fit together)

1. ENROLL → send the Welcome Packet. New client feels taken care of; chargeback risk drops.
2. ALL YEAR → run the Touchpoint Calendar. You stay top-of-mind; the TV-ad call center never gets a foothold.
3. SEPTEMBER → send the ANOC Explainer. You decode the scary letter before they panic, and book the review.
4. AEP / RENEWAL → run the Annual Review Kit. You confirm the plan still fits; the client stays.
5. AFTER THE REVIEW → use the Referral Engine. Goodwill peaks; you ask; your pipeline fills.

Start here:

Open each tool, find-and-replace the [BRACKETS] with your name/agency/phone/email once, and save your masters. Then you're running a professional retention system in minutes a week.

Compliance note (applies to all tools).

These are service/retention communications for clients you've already enrolled — not prospecting or plan marketing. Keep client-facing pieces free of plan names, premiums, and benefit claims. Send only to consented clients; honor opt-outs (TCPA/CMS). Follow CMS communication rules and get FMO/carrier approval. Not legal, tax, or compliance advice.

Thank you for trusting TemplateTitanHQ.

More agent tools → templatetitanhq.etsy.com

Complete Your Agent Toolkit

You own one piece — here's the rest of the system. Bundles save 50%+ vs singles.

- **Agency-in-a-Box — the flagship** — Every tool in one download. Best value.
- **Compliance Suite** — SOA log, TCPA consent, CMS audit & C-SNP/SSBCI eligibility.
- **Retention Suite** — Renewal radar, annual reviews, referral engine & onboarding.
- **Income & Ops Suite** — Commission, lead ROI, 1099 bookkeeping & chargebacks.



Browse everything → templatetitanhq.etsy.com

Thank you for your purchase! An honest review helps this small shop a lot.