

TEMPLATETITANHQ

New Client Welcome Packet

Onboard new Medicare clients so they stay — and never get clawed back

2026 EDITION

Professional Templates. Zero Guesswork. More Closed Business.

Start Here

The fastest way to lose a brand-new client — and get your commission clawed back — is a quiet first 90 days. A new member who doesn't understand their card, their pharmacy, or who to call gets nervous, sees a TV ad, and disenrolls before the plan ever pays you in full. This packet removes that risk.

Why this packet pays for itself:

Rapid disenrollment happens in the first three months (and the MA Open Enrollment window, Jan 1 –Mar 31, is prime danger). Each prevented early disenrollment protects roughly \$300–\$700 in clawed-back commission — for sending one warm welcome.

What's inside

- The Welcome Sequence — the day-by-day cadence that locks in a new client.
- A warm, editable Welcome Letter — the centerpiece you send the day they enroll.
- “Your Plan, Made Simple” one-pager — ID card, pharmacy, PCP, and what to expect, in plain English.
- Contact & Consent form — capture phone/email + text/email permission (so you can keep reaching them).
- A “Call Me First” wallet card — the single best anti-disenrollment tool.
- Day-30 and Day-60 check-in scripts — the touches that turn a new buyer into a keeper.

How to use it (5 minutes, once)

1. Open in Word or upload to Google Docs (File ▶ Open ▶ Upload).
2. Find-and-replace every [BRACKET] once — your name, agency, phone, email. Save as your master.
3. The day a client enrolls: send the Welcome Letter + one-pager, hand over the Call-Me-First card, and log them for the Day-30 touch.

Compliance note — read before sending.

These are service/onboarding communications for clients you have ALREADY enrolled — not prospecting or plan marketing. Do not add specific plan names, premiums, or benefit claims to client-facing pieces. Follow current CMS communication rules and get FMO/carrier approval before distributing. Productivity template only — not legal, tax, or compliance advice.

The Welcome Sequence

Run the same play on every new client. It takes minutes and it is the highest-ROI hour in your week.

When	Move	Why it works
Day 0 (enrollment day)	Hand over / email the Welcome Letter + "Your Plan, Made Simple" one-pager + the Call-Me-First card	They leave feeling taken care of, not abandoned
Day 1-2	Confirm contact info + get text/email consent (use the form)	Lets you legally keep reaching them all year
Week 1	Quick "did your card arrive?" text	Catches confusion before it becomes a complaint
Day 30	Day-30 check-in call/script	The window where doubt creeps in — you close it
Day 60	Day-60 reassurance touch	Carries them past the rapid-disenrollment danger zone
Ongoing	Log them into your annual-review cadence	Onboarding flows straight into retention

The mindset that keeps the commission:

The sale isn't done when they sign — it's done when they're still happy at Day 90. Onboarding IS chargeback prevention.

The Welcome Letter

Send the day they enroll — email or printed. Warm, simple, reassuring. Replace the [brackets]; keep it free of plan-specific claims.

WELCOME LETTER

Dear [First Name],

Welcome — and congratulations on getting your Medicare coverage set up for [YEAR]. I'm honored you chose to work with me, and I want you to know what happens next so there are no surprises.

Over the next couple of weeks you'll receive your member ID card and a welcome packet from your plan in the mail. Once your card arrives, keep it with you and bring it to your doctor and pharmacy.

Here's the most important thing: if anything ever feels confusing — a bill, a card, a pharmacy question, a letter you don't understand — call me FIRST. That's exactly what I'm here for, all year long, at no cost to you. You're never figuring this out alone.

I've enclosed a simple one-page guide and a card with my number. Keep them handy.

Thank you for trusting me with something this important. I'll check in with you soon.

Warmly,

[Agent Name] • [Agency] • [Phone] • [Email]

Your Plan, Made Simple

A plain-English leave-behind for the new client. Generic on purpose — fill in only their personal contacts, never plan-specific benefit claims.

What to know	What to do
Your member ID card	Arrives by mail in ~1-2 weeks. Carry it. Show it at the doctor and pharmacy.
Your pharmacy	Fill prescriptions at an in-network pharmacy. Not sure? Call me and I'll check.
Your primary doctor (PCP)	Keep seeing your doctor. If you need to confirm they're in-network, call me first.
A bill or letter you don't understand	Don't panic and don't switch on your own — call me and we'll sort it out together.
Your yearly review	I'll reach out before anything renews to make sure your plan still fits you.
Reaching me	[Agent Name] — [Phone] — [Email]. I'm your person for anything Medicare.

Remember:

You have one phone number for all of it — mine. Before you change anything or worry about anything, call me first.

Contact & Consent Form

Capture this at enrollment. Permission to text and email is what lets you legally run your touch cadence all year — don't skip it.

Field	Client entry
Full name	[_____]
Best phone	[_____]
Email	[_____]
Mailing address	[_____]
Preferred contact method	☐ Call ☐ Text ☐ Email
Consent to receive texts from my agent	☐ Yes ☐ No Initials: _____
Consent to receive emails from my agent	☐ Yes ☐ No Initials: _____
Birthday (for your annual review reminder)	[_____]

Keep this on file. Honor opt-outs immediately and follow all applicable contact-consent rules (TCPA, CMS). Pairs with our TCPA Consent & Contact Log.

“Call Me First” Card

Print, cut, and hand to every new client (wallet-sized). This one card prevents more disenrollments than anything else you do.

CALL ME FIRST — cut & hand to client

QUESTIONS ABOUT YOUR MEDICARE? CALL ME FIRST.

Before you switch plans, pay a confusing bill, or worry about a letter —

[Agent Name], your Medicare agent

 [Phone]  [Email]

No cost. No pressure. All year long.

Day-30 Check-In

DAY-30 — call or text

Hi [First Name], it's [Agent Name], your Medicare agent. You're about a month in — did your ID card arrive okay, and have you been able to use your pharmacy and doctor without any trouble? Anything at all confusing? I'm here to make this easy — that's my job.

Day-60 Reassurance

DAY-60 — text

Hi [First Name], [Agent Name] checking in — everything still good with your plan? If anything's come up, call me first and we'll handle it. No need to ever figure this out alone. — [Phone]

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