



Agent Bulletin

Allied National - The Small Group Benefit Experts

March 2023

Self-Service Site

Employer Resources



What to Know This Month

Here's a sneak peek at the highlights in this issue:

1. Allied's Agent Survey Results: Here's What You Had to Say
2. Spotlight on Freedom Hybrid Plan
3. Cost Saver — The Budget Friendly Health Plan
4. Pivot Health's Double Whammy Bonus
5. 2023 Pivot Health Top Producer Trip

Allied's Agent Survey Results: *Here's What You Had to Say*

Allied National sent you a survey in January asking you to tell us how we're doing. Many of you answered and shared your insight on what you think we are good at and what we need to improve upon.



Lisa Hodson & Jason Gibson talking with agents Feb. 28, 2023.

The chart below shows the most frequent responses, but here are some of the comments:

Positives

- ✓ Excellent Service
- ✓ Trustworthy & Honest
- ✓ Great Products
- ✓ Adequate Commissions
- ✓ Accessible, Good People
- ✓ Innovative & Creative
- ✓ Stable
- ✓ Low Rates

Upgrades Needed

- ✓ Brand Awareness
- ✓ Innovation
- ✓ RBP Not Accepted
- ✓ Technology
- ✓ Overloaded Staff
Delay Answers
- ✓ High Rates

Positives

Our greatest asset is our people. One agent said that we're "great relationship people." Another commented, "Allied is: Reliable, Professional, Honest."

"An agent can be assured that Allied National will stand behind their products & provide excellent service," a third agent said.

And lastly, "I have found them to be honest," an agent said, "even when the answer is not what I wanted to hear."

We also read that you love our plans, like Funding Advantage. "Good product, good price, good service (you have the good!)," said one complimentary agent. While another said we have, "Competitive rates, unique products, user-friendly service."

Upgrades Needed

Here's what agents mentioned and what we're working to improve in 2023:

- **Brand Awareness** – We are working on providing more marketing support.
- **Innovation** – Allied has always strived to be at the front of product innovation. Level funding, Reference Based Pricing, Hybrid plans, Allied Healthcare Assistant all were developed to keep us in the forefront of products and features for you to represent.
- **Reference-Based Pricing Not Accepted Everywhere** – We're looking at additional solutions to provide a directory of providers who are likely to accept RBP. We're also working on additional member and employer communications about EOBs, potential balance bills and when/how to engage your agent or Allied.
- **Technology** – We're replacing our current WINAllied Proposal Software with a new web-based platform which we are planning to debut in the 3rd quarter. The new system is Web based. There will be no more need for the installation of a stand-alone windows PC application. This new system will be available to Apple users, as well, since it's a web application.
- **Overloaded Staff Delay Answers** – We are implementing a new process to better support sold cases with the introduction of a drop box that will serve as a centralized location for submission material. This drop box will streamline the process and eliminate delays. The existing agent phone number also is being revamped so that escalated issues go

directly to the appropriate staff.

Thank you to everyone who took time to respond to the survey. As always, feel free to reach out to Sales Support at sales@alliednational.com with your comments.



Freedom Hybrid Plan

Allied National's Freedom Hybrid is the perfect plan for your clients who are interested in having a reference-based plan, but like the familiarity of having a PPO.



Members can choose to see a physician in their PPO network or go out of network - they will never be penalized. Members also can receive care from any health care facility and still get affordable care.

And, if after trying the plan the employer decides a traditional PPO only plan would be a better fit, the group can move to a traditional PPO plan with no change in rate until renewal.

Here are just a few more features that make the Freedom Hybrid Plan great:

- Major medical coverage
- Access to the Prime Health Services Network or PHCS - Practitioner & Ancillary Network
- Telehealth access
- Balance Billing Legal Support
- HSA options

If you have questions or would like help presenting this plan to your clients, please contact one of our Sales Support team members and they will be happy to assist you. Call 888-767-7133 or email sales@alliednational.com.

Cost Saver — *The Budget Friendly Health Plan*

Are you looking for a budget friendly solution to the high cost of traditional

major medical plans for your clients? Allied's Cost Saver Plan would be a great option for you to share with your clients.

Cost Saver plans have no medical underwriting for groups of two or more and is an easy way for your clients to retain a benefit plan in the wake of the increasing major medical plan costs. In addition, members have unlimited physician benefits and cash benefits for surgeries and facilities and 24/7 access to telehealth.

You can use this great Cost Saver video to share with your clients to help explain the benefits and sell this plan.



Pivot Health's Double Whammy Bonus

Now through March 31, 2023, you can “double up” on your earnings potential when you sell a Pivot Health Plan. Earn UNLIMITED dollars through Pivot Health's quarterly bonus program while also earning points towards Pivot's exciting awards trip to Nashville this fall.



Show us that you're a TOP producer!

Get \$150 for every application when you sell a minimum of fixed benefit medical for 12 months and short-term medical (STM) for multiple 12-month durations. Plus...

- Get \$100 for every 364-day STM, and
- Get \$50 for every 180-day STM, dental and supplemental plan!

Duration requirements apply. There is a baseline of seven applications. Once the baseline is met, the bonus pays out back to the first submitted application! Click on the button below for the bonus flyer.

[Double Up Bonus Flyer](#)

2023 Pivot Health Top Producer Trip

Join Pivot Health Sept. 7-10, 2023, at the luxurious Gaylord Opryland Resort when you qualify as a TOP producer! Every sale you make between Sept. 1, 2022, and May 31, 2023, earns you points towards the ultimate goal of an awards trip to rockin' Nashville!



You earn TOP producer eligibility when you collect a total of 500 points. You get points for every sale when you enroll clients into Classic, Core, Epic and Quantum short-term medical (STM) plans, Anchor fixed benefit medical, Latitude supplemental and Brilliant dental.

- Anchor medical: 10 points.
- STM 12+ months: 10 points
- STM 6-12 months: 6 points
- STM 3-5 months: 4 points
- Latitude supplemental: 2 points
- Dental: 2 points

Policy must remain in force for a minimum of 90 days. Click on the button below for the trip flyer.

[2023 Top Producer Trip](#)

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