FREE ADVISOR RESOURCE · OPERATING PLAYBOOK

The AdvisorCove Workflow Overview

A practical guide to building a clearer Medicare client experience before, during, and after the first conversation.

> A better workflow is not more software. It is fewer unclear handoffs.

For independent Medicare advisors preparing for a busier AEP and a more organized year-round practice.

01 · THE OPPORTUNITY

Busy seasons expose the process you have not made visible.

A prospect may discover you online, ask a complicated question, submit a form, wait for a response, and then repeat the entire story on a call. Every unclear transition creates work for the advisor and uncertainty for the client.

THE OPERATING PRINCIPLE

Design the next action before demand arrives.

Before AEP, decide how a person finds you, prepares, requests help, gets a response, and continues into a review relationship. The goal is not to remove the human conversation. It is to protect time for the part only you can do.

What a complete workflow must provide

Clarity

Who you help, where you work, and what happens after someone clicks.

Preparation

A calmer way for a client to organize questions and priorities.

Ownership

One visible owner, response expectation, and next action for each request.

Continuity

A path from first conversation to follow-up and annual review.

02 · THE COMPLETE CLIENT PATH

Five stages. One connected experience.

Each stage should make the next stage easier. If a stage ends without a clear owner or next action, the workflow has stopped.

01
Be discoverable

Make your audience, service area, credibility, and starting point obvious.

02
Let the client prepare

Guide the visitor through a private, session-based preparation experience.

03
Prepare the review

Organize context and questions without presenting unsupported final advice.

04
Connect with intention

Make a consent-based request with a clear response expectation.

05
Review and follow through

Verify, recap, schedule, and continue the relationship deliberately.

THE STANDARD

Every stage should answer: What is the client trying to do? What does the advisor own? What does the system support? What happens next?

03 · STAGE ONE

Be discoverable without making people work to understand you.

A professional website is not just a digital brochure. It is the first operating surface of the practice.

CLIENT EXPERIENCE

The visitor can answer three questions quickly: Is this advisor for me? Do they serve my area? What should I do now?

ADVISOR OWNS

Define your audience, states and service areas, contact preferences, booking path, and the claims your marketing can support.

SYSTEM SUPPORTS

Branded pages, Medicare education, visible calls to action, contact options, and a guided-intake entry point.

SUCCESS LOOKS LIKE

A person starts with the right expectation and reaches the next step without needing to call for basic information.

Website readiness checklist

- ◻ Your name, role, audience, and service area are immediately clear.
- ◻ The primary call to action uses one plain-language verb.
- ◻ Education explains the conversation without promising a result.
- ◻ Contact, booking, and response expectations are easy to find.
- ◻ License and appointment claims are accurate and current.

04 · STAGE TWO

Let the client prepare before asking them to explain everything live.

Good intake reduces anxiety and improves the quality of the first conversation. It does not replace discovery, advice, or licensed review.

A USEFUL PREPARATION PATH

Location · Coverage situation · Doctors · Medications · Pharmacy preferences · Top priority

Ask only what helps orient the conversation. Explain why each question matters and let the person move at a comfortable pace.

Protect the client

- Use clear consent language.
- Explain what is session-only.
- Do not imply official eligibility verification.
- Do not present a preliminary signal as a recommendation.

Protect the advisor

- Set the role of licensed review early.
- Make the next step visible.
- Capture contact details only when requested.
- Keep healthcare details out of permanent handoff records during launch.

> Preparation should make the conversation more human, not make the advisor less important.

Prepare the review, then make the request actionable.

STAGE THREE · PREPARE

Give the advisor a starting point, not a false conclusion.

Plan context and comparison signals can help a person see what to discuss. Current plan details, provider and pharmacy availability, costs, eligibility, suitability, carrier requirements, and enrollment decisions still require appropriate licensed review and verification.

AdvisorCove supports: organized session context, plan-view signals, plain-language boundaries, and a contact-safe request.

STAGE FOUR · CONNECT

A request needs an owner and a response expectation.

Tell the client what happens next: who will respond, how they will respond, and what the first conversation will cover. Internally, use a simple status such as New, Contacted, Scheduled, Waiting, Completed, or Closed.

Advisor action

Confirm consent, acknowledge the request, choose the next action, and set a calendar path.

System action

Keep request context visible, support calendar readiness, and make status changes easy to see.

Follow-through is where a workflow becomes a practice.

The first call is not the finish line. A reliable advisor experience makes the outcome and next review date visible.

Use an outcome-based rhythm

Scheduled

Confirm the meeting format, purpose, and anything the client should have available.

Waiting

Make the missing action explicit: client response, advisor verification, carrier information, or calendar decision.

Completed

Recap what was discussed, what was verified, what remains open, and when the next review should occur.

Closed or no decision

Close respectfully, record the operational outcome you are permitted to retain, and define whether a future follow-up is appropriate.

Annual review habit

At the end of each active relationship, create a deliberate future touchpoint. A calendar reminder, review queue, or client status is more dependable than memory. Keep retention and deletion practices aligned with your compliance policy and the information your practice is authorized to retain.

07 · PUT IT INTO PRACTICE

Find the weak handoff first.

You do not need to redesign your whole practice in one week. Start where the client experience currently loses momentum.

- ☐ A visitor can understand your audience, service area, and next step.
- ☐ Your intake prepares a conversation without over-collecting sensitive information.
- ☐ Your plan context is clearly labeled as preparation, not final advice.
- ☐ Every request has consent, an owner, a response expectation, and a status.
- ☐ Verification responsibilities remain with the licensed advisor.
- ☐ Completed conversations have a clear outcome and appropriate next review date.

Choose one improvement for this week.

Rewrite one call to action. Publish your response window. Create your request statuses. Add a calendar path. Schedule your next annual-review touchpoint. Small visible improvements compound when they are connected.

> Prepare the process. Protect the relationship.

Explore AdvisorCove at advisorcove.com