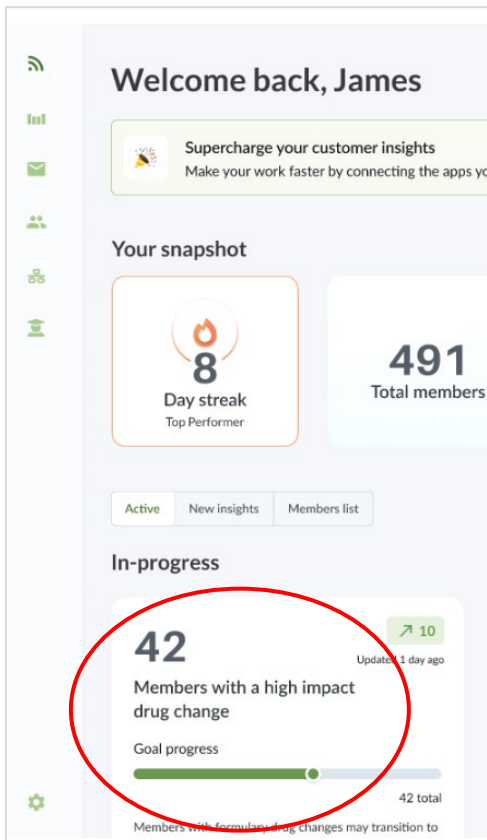


NEW! ConnectureDRX Active Analytics Platform – Audience Use Cases

Empowering organizations to leverage real-time data for precise, targeted member outreach—turning **INSIGHTS** into **ACTION**.

MEMBER

Member Sally learns a critical drug is going off-formulary BEFORE the new plan year starts.



Sally, a Medicare member, has been identified as taking a blood pressure medication that will no longer be covered by her Medicare Advantage (MA) plan in the upcoming year. Sally is one of the 42 members with a “high impact drug change” as appears on the ConnectureDRX Active Analytics Platform.

Without intervention, Sally would most likely learn of the formulary change as the pharmacy. But her agent, alerted via the platform, quickly identifies her and the other 41 affected, streamlining support despite managing 491 customers.

Using an existing email communication system, the agent reaches out to Sally to inform her of the upcoming change via a personalized message. And, as the agent is already using ConnectureDRX for Medicare shopping and enrollment, he can efficiently guide Sally toward exploring alternative medications that remain on formulary. This allows her to discuss potential therapeutic replacements with her healthcare provider

as well as plan for any cost implications.

Early notification provides key benefits for members:

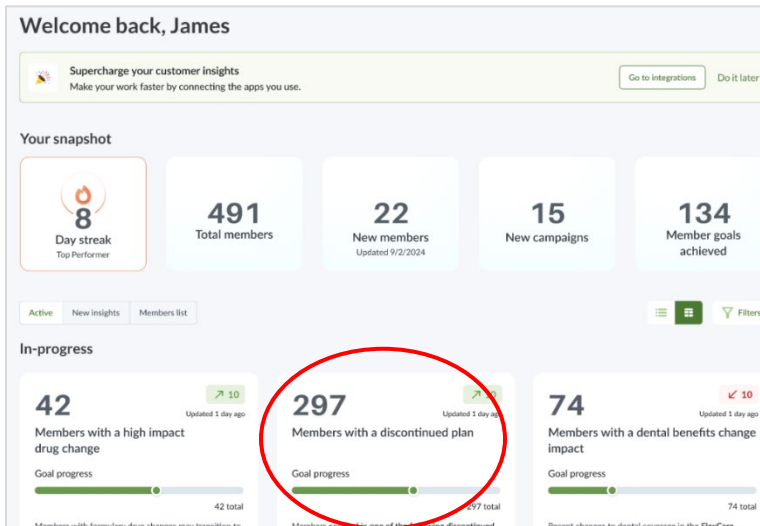
- Helps members effectively manage health conditions.
- Allows members to anticipate any financial impact by switching medications.
- Prevents an unexpected disruption at the pharmacy in the new year if members decide to remain with their current plan.

By leveraging the ConnectureDRX platform, the agent enhances customer support and helps ensure a smooth transition for members total impacted by formulary changes.



INDEPENDENT or INDIVIDUAL AGENT

Agent James uses data-driven insights to protect and grow his customer base when members are impacted by a discontinued plan.



Agent James manages a book with 491 customers. As he prepares for the upcoming Annual Enrollment Period (AEP), he discovers that 297 of his clients will be affected by a discontinued plan. With key insights, James can proactively inform members using his preferred communication channels—email and text—ensuring impacted members are well-informed before AEP begins.

By identifying members who need immediate attention, James can focus on what matters most (and not worry about those not impacted by the change). This proactive approach ensures smooth plan transitions, boosts retention, and prevents last-minute issues—saving time and setting the agent up for long-term success.

Key benefits of proactive agent-member engagement:

- **More personalized and productive conversations** – Tailored recommendations make plan discussions more meaningful and relevant.
- **Increased efficiency by targeting the right members at the right time** - Agents save valuable time and can optimize workflows.
- **Empowered decision-making** – Access to data insights guide agents in making informed, strategic decisions.
- **Opportunities for cross-selling** – As members explore new plan options, agents can introduce ancillary plans to enhance coverage.
- **Elevate agent confidence** – Knowing members' needs in advance gives agents' a leg up and helps alleviate stress over potential customer losses.
- **Business growth and scalability** – With a proactive strategy in place, agents can focus on expanding their book of business instead of scrambling to retain customers.



CALL CENTER AGENT

Call Center Representative Alex enhances member support through data-driven call center engagement

As a representative at a health plan call center, Alex is responsible for assisting thousands of members with their Medicare plans. Ahead of the upcoming Annual Enrollment Period (AEP), Alex receives a data-driven report that highlights 297 members who will be affected by a discontinued plan. With this insight, Alex and his team proactively reach out to impacted members, providing guidance on alternative plan options before they encounter disruptions in their coverage.

By taking a proactive approach, the health plan enhances its member experience, improves retention, and reduces inbound call volume from confused or frustrated members. Instead of waiting for members to call after experiencing issues at the pharmacy or provider's office, the call center team can provide clarity and reassurance in advance.

Key benefits of proactive health plan engagement via call centers:

- **Improved member satisfaction** – Personalized outreach strengthens relationships, showing members their health plan is looking out for them.
- **Reduced inbound call volume** – By addressing concerns proactively, the health plan prevents a surge in reactive member inquiries.
- **Efficient use of call center resources** – Representatives can prioritize meaningful, solution-oriented conversations instead of handling last-minute issues.
- **Stronger retention and loyalty** – Members feel supported and are more likely to remain with their current health plan rather than seeking alternatives.
- **Opportunities to offer additional coverage** – Representatives can introduce supplementary benefits and coverage options tailored to members' needs.
- **Strategic growth and stability** – Proactively managing member transitions strengthens the health plan's reputation and operational efficiency.

By leveraging data insights, call center agents transform AEP into an opportunity to elevate the member experience, ensure seamless transitions, and reinforce the health plan's (or FMO's) commitment to delivering high-quality care and service.



EXECUTIVE

CEO Kristie of a large FMO regularly sees the impact to their organization at a high level and drives smart growth with data-driven insights

As an executive at a leading Field Marketing Organization (FMO) specializing in Medicare, leveraging data-driven insights is critical for maintaining a competitive edge. With access to data at a high level on the ConnectureDRX Active Analytics Platform, the FMO can proactively identify members affected by plan changes, drug formulary changes, plan cost increases and more and empower agents and call center teams to provide timely and targeted support.

By integrating this intelligence into operations, Kristie knows her agents can now focus on high-impact interactions, reducing churn and improving retention. Rather than reacting to plan disruptions during AEP, Kristie and her FMO take a proactive approach, reinforcing trust and positioning her organization as a leader in Medicare distribution.

Key benefits for data-driven sales and retention:

- **Maximized agent efficiency and productivity** – Agents spend their time on the right members, leading to higher retention and conversion rates.
- **Improved member loyalty** – Proactive outreach reduces disruptions and ensures members feel supported by their trusted advisors.
- **Optimized resource allocation** – Strategic deployment of sales and service teams ensures that efforts are focused where they matter most.
- **Enhanced competitive advantage** – Staying ahead of plan changes sets FMOs and health plans apart from reactive competitors.
- **Increased revenue growth** – Key insights open new opportunities for cross selling ancillary products and additional benefits to members.
- **Scalability and market expansion** – A streamlined, data-informed strategy allows for scalable growth across multiple regions and markets.

With this platform, executives are transforming the Medicare sales and retention process from a reactive model to a proactive, strategic approach. This not only strengthens relationships with agents and members but also drives long-term success in an increasingly complex and disruptive Medicare market.

Visit connecture.com or email marketing@connecture.com to learn more and schedule a demo.

