

The **ConnectureDRX Active Analytics Platform** is a powerful member insights tool that gives agents, FMOs/agencies and health plans unprecedented clarity and transparency into their own data.

The following are excerpts from an interview with **Chris Hagerstrom, Director of Marketing Strategy, Jack Schroeder and Associates** regarding his agency's experience with **ConnectureDRX's Active Analytics Platform.**



Identifying the right clients to engage

We knew this AEP would be chaotic, so we asked: how can we turn chaos into a marketing advantage? Marketing is simply about awareness, and our goal was to give agents a powerful platform—without the high costs of traditional marketing tools.

By leveraging our data and ConnectureDRX's capabilities, we created a system that highlighted key marketplace changes, giving agents a clear, data-driven edge. Initially, we thought this would be a simple email platform to boost business. Instead, it became JSA's most valuable tool this past AEP.

On October 1, we analyzed year-over-year enrollment changes for 2024, and the results were eye-opening. We thought drug costs were going to be an issue, but the real disruption came from **drug formulary changes**. Beneficiaries were losing access to key medications.

ConnectureDRX's **Active Analytics Platform** made these shifts visible, allowing agents to proactively address formulary changes before they became problems.

This wasn't just about awareness—it was about preparedness.

An AEP "Cheat Code"

Without this tool, we wouldn't have known who to reach out to.



We took a proactive approach with agencies and agents—analyzing their books and telling them exactly who needed attention. Instead of scrambling to contact 2,000 PDP clients, we showed agents the 75 who required action.

That level of data was game-changing. It transformed anxiety and uncertainty into clear, smart decision-making. Agents became more efficient, navigating the challenges of AEP with confidence.

The result? Our biggest year of growth.

This tool wasn't just helpful—it was a **game-changer**. It felt like having a cheat code for AEP.

A groundbreaking election year

Election years usually disrupt AEP—business slows down until Super Tuesday, then a rush of enrollments floods in at the end. This year was different. With Active Analytics and proactive outreach, we got ahead of the chaos. **39% of our AEP production was completed before the election.**

Agents weren't scrambling last-minute. They identified priority clients early, handled plan changes efficiently, and stayed in control. Instead of playing catch-up, **the rest of AEP became pure growth.**

The difference was transformative.

Consolidate data, then leverage it

Many agents still rely on paper enrollments or carrier websites. We're showing them why they need a **multi-carrier enrollment platform** to navigate anticipated AEP changes.

Having **all your data in one place** is critical. (One agency in Milwaukee had to review 4,000 PDP enrollments manually because they didn't have this platform).

This tool not only stores data—it puts it to work.

It helps agents focus on the right clients, streamline enrollments, and prepare for market shifts—especially as carriers change formularies again.

The next few AEPs will be chaotic. This tool brings order to the chaos.



Opportunities to cross-sell ancillary plans

The Active Analytics Platform helps analyze **client personas and buying tendencies**, allowing for more **targeted conversations**.

Instead of a generic sales pitch, agents can say:

"Many clients like you have added hospital indemnity, cancer coverage, or extra dental benefits—let's discuss your options."

By leveraging data, we can identify the right opportunities for ancillary sales, which not only benefit clients but also **help stabilize the market year-after-year**.

Beneficiaries need agents who have the DATA and ACT upon it.

Agents are the stewards of Medicare, guiding millions of beneficiaries to the right health coverage.

In a few years, the Medicare population will reach 80 million, while the number of industry professionals continues to shrink. As new marketing rules tighten, lead generator call centers are being pushed to the sidelines. This means more people will rely on agents who will be expected to manage more clients than ever.

Growth isn't just about revenue—it's about responsibility. More clients mean more lives depending on us for their health and well-being.

Summary

Having access to this level of data—and a system that puts it to work—is the next big revolution in our industry.

Challenges like non-commissionable plans and suppressed plans will always arise. But instead of just complaining about them, we can now **see the data in real time and act**.

That's why the **ConnectureDRX Active Analytics Platform is a true game-changer**.

Email marketing@connecture.com for a platform demo and to speak to a sales representative.

