A Modern Sales Platform for Medicare Insurance Agents

AgentaHub's SaaS platform connects Medicare insurance sales agents to their leads and clients. From client information collection, custom plan scoring algorithms, and a full CRM, Agentahub is saving agents valuable time and increasing revenue.

Name	Phone	Close
Joseph McCoy	314.564.5215	05/26/21
j.mccoy@edwardsjones.com		

Tasks

Send email on upcoming renewal 1+
Today

**Pipeline**

Closed

Plan

aetna

All-in-one Medicare Sales Solution

AgentaHub helps Medicare agents streamline client onboarding, organize their pipeline, and prioritize their operational processes to sell more plans in less time.

Agents Struggle with Client Management

For Medicare agents, efficiency and productivity is paramount. There are too many roadblocks in the sales process, limiting the number of clients they can service because of burdensome and complicated manual workflows.
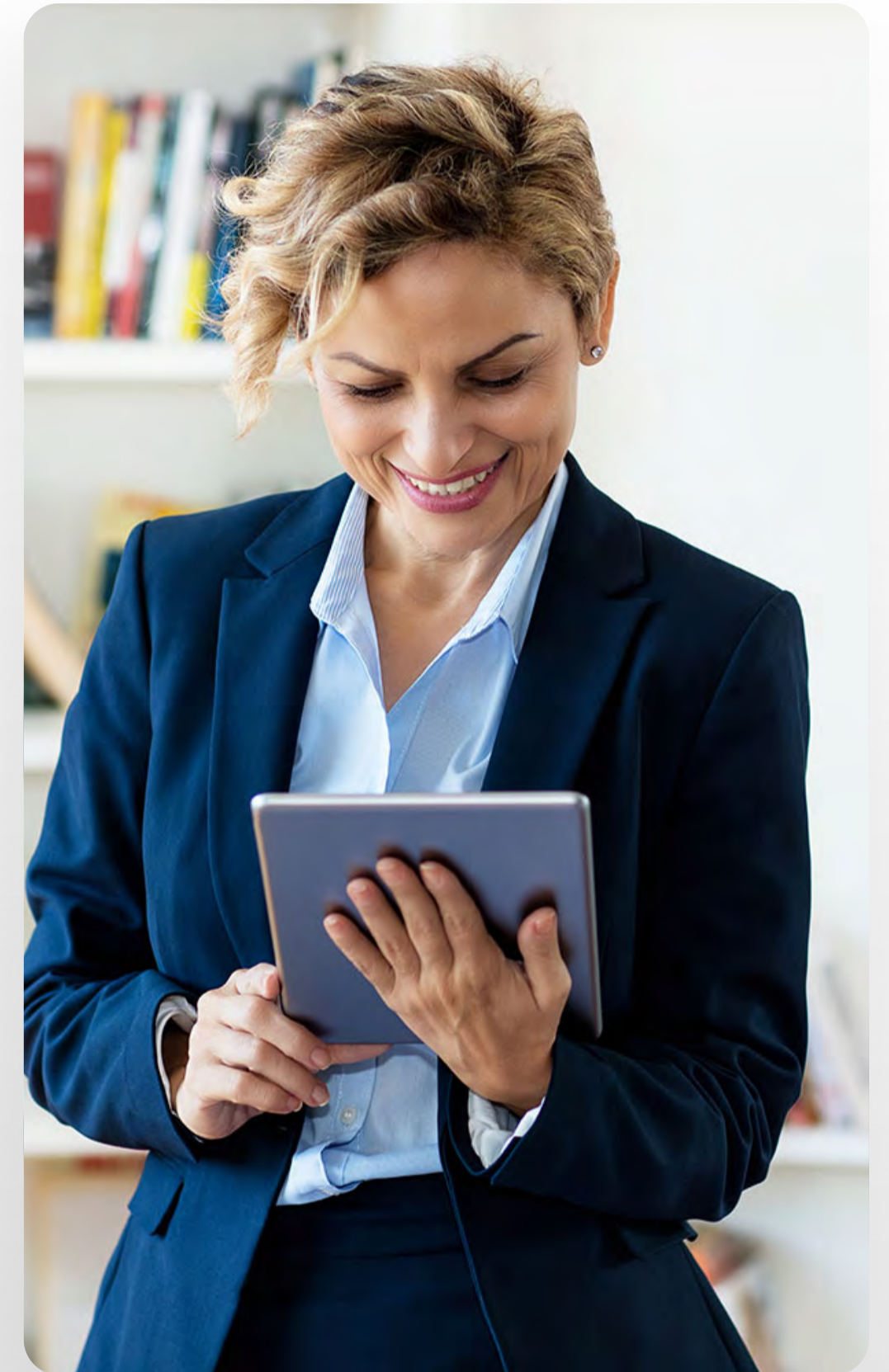
Parux Leads Branding, Design and Developing SaaS Platform

AgentaHub Founder Dave Adams had a pain-point and a seed of a solution. He was spending too much time collecting client information and looking up plans. He partnered with Parux to grow his idea into an SaaS platform and brand.
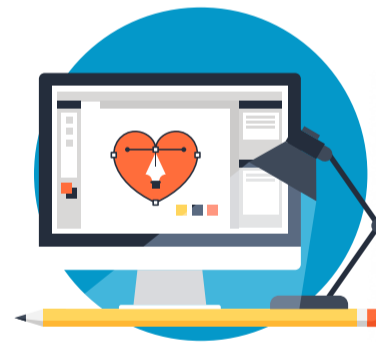
Ideation

Branding

UX Design

UI Prototyping

Data Management

Development

Meet Diane

Diane is a typical Medicare agent. She struggles to meet the demands of her clients, and seasonal peaks during the Annual Enrollment Period create workloads that make it hard to keep up with. Both her professional and personal life suffer. For months at a time, she can't keep up with reviewing current clients and onboarding new ones. This limits her business growth, and encroaches on her personal time. Diane also doesn't have the tools to manage her business, and understanding her key metrics and analytics is elusive.
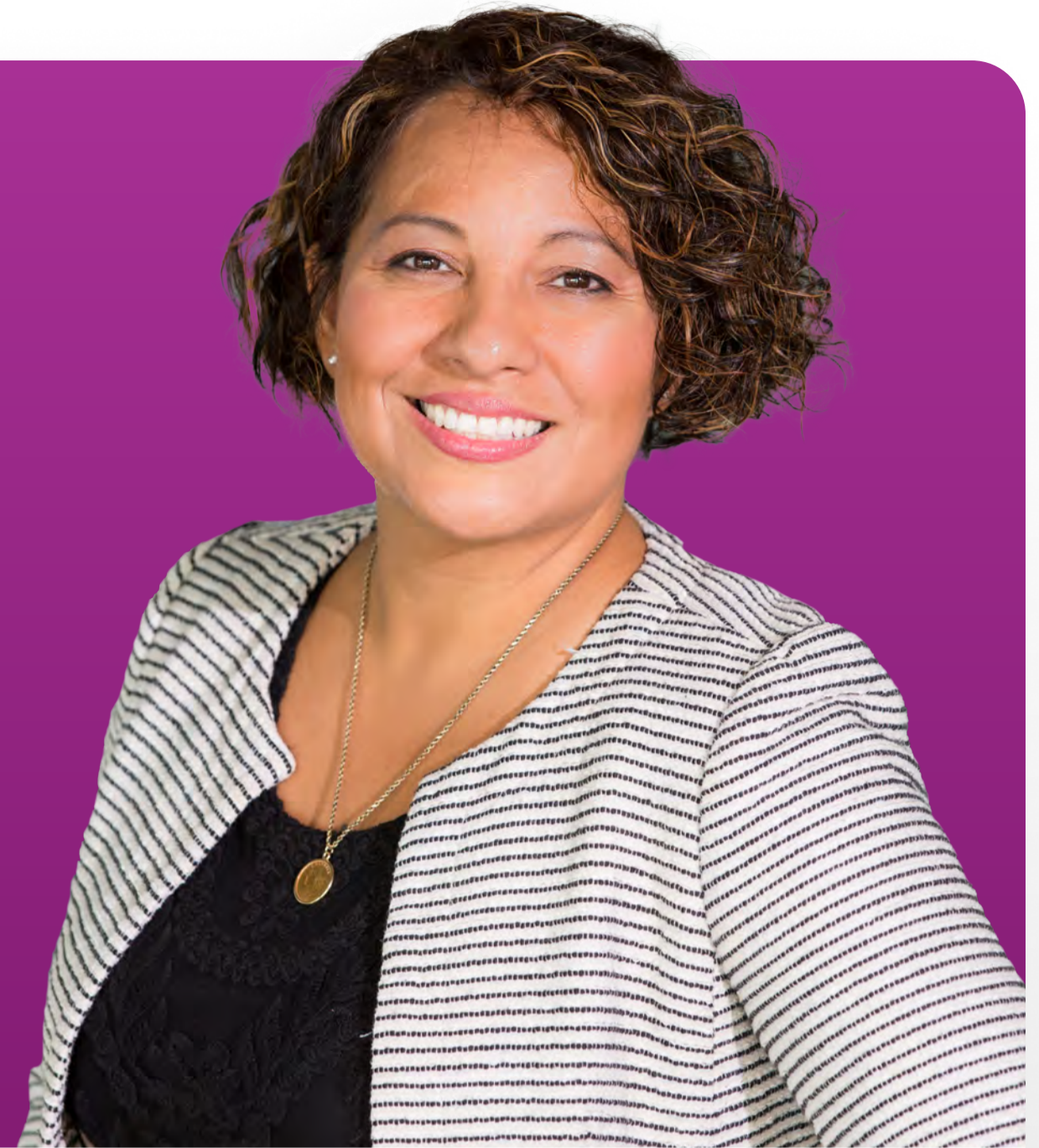
PERSONALITY

Tech Savvy
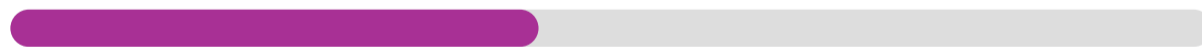
Analytics Centric

Open to Innovation

Organization

PAIN POINTS

- Getting bogged down by manual processes in plan evaluation.

- Not getting enough lead generation built for a pipeline.

- Inefficiencies on closing Medicare sales.

- Not hitting performance metric goals to grow business.

Manual Processes are Inefficient

The biggest problem Medicare agents face is the manual process for selecting the right plan for their clients. The agent collects data such as their doctors and drugs. Then the agent has to log into to multiple websites and manually search and annotate across dozens of plans for the best match. It is a slow, inadequate process that often takes an hour or more per client.

In addition, agents struggle with managing their contacts and leads. They are faced with using industry built tools or subscribing to expensive, generic CRMs. Industry-created CRMs and management tools are crude, and don't allow agents to effectively manage their pipelines and their business overall. Agents who use an off-the-shelf CRM, end up paying high subscription fees, only using a fraction of the platform, and still have to leverage manual tools to supplement their industry-specific need.

Research Overview

While our client, Dave Adams, was a seasoned Medicare agent, he knew his needs might be different than others. We conducted extensive research through agent interviews to identify key pain points in their sales process.

> "
> The sales process was taking far too long to complete, and finding the right plan for their clients was **enormously inefficient.** Not being able to close on the call resulted in lost sales.

> "
> Agents didn't know the health of their businesses. **Key metrics and analytics were not readily available.**

> "
> The sales workflow and scheduling was **cumbersome, difficult and haphazard,** and engaging with clients was a manual process.
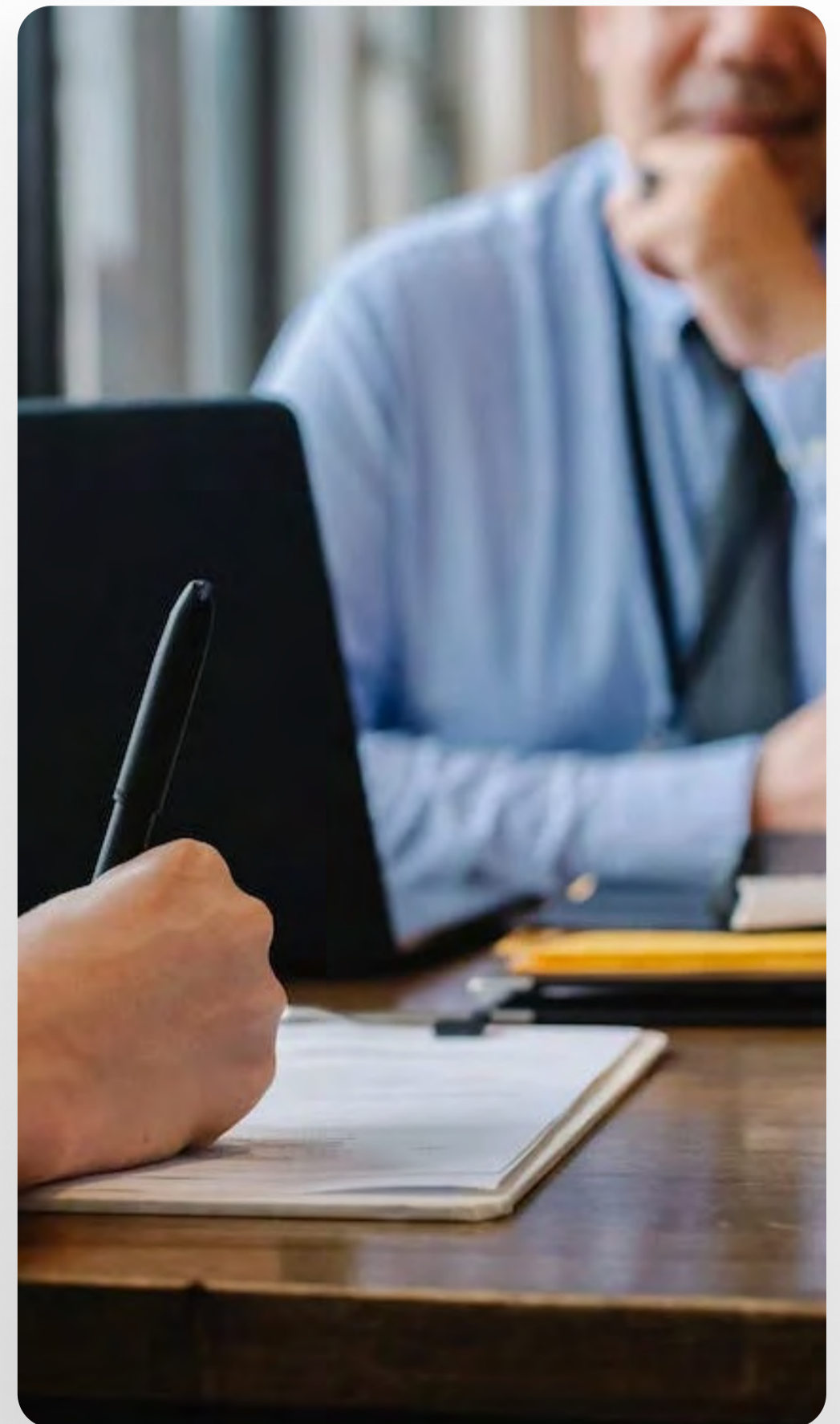
Introducing AgentaHub

AGENTAHUB

AgentaHub was designed by agents, for agents. It eliminates major sales onboarding bottlenecks and provides unparalleled CRM and management tools specifically designed for Medicare agents.

UX Flows

Creating a user experience that made it easy for agents to onboard clients and to run and manage their business was a key requirement. Agents need clean workflows, with instant access to data, tasks, and reports.
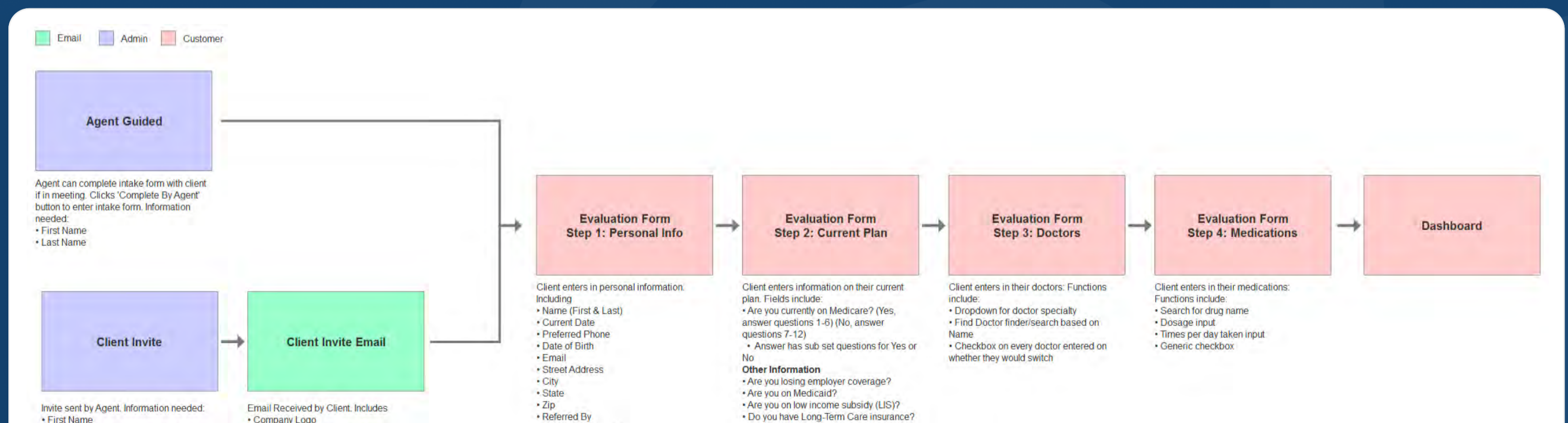
UX Problem

One problem to solve was the cumbersome process of collecting client information. This is usually a manual process where a printed form is filled out by hand by the client and then transcribed by the Agent or their staff.

How can this form work digitally to allow for quicker processing, reduce transcribing errors, and improve plan matching?

UX Solution – User Journey Mapping

Through interviews with stakeholders and end-users, we gathered requirements on features and information needed for client intake. Based on this feedback we designed a digital user journey that gathered all the client's information in a clear and efficient way. The experience was designed so the form was sent to clients via a secure hashed email link. The form was then organized in easy-to-navigate steps with automatic doctor and prescription look ups. This allowed the form to include new questions such as "Are you willing to switch your primary doctor?" to open up plan options.

Legend: Email / Admin / Customer

Agent Guided
Agent can complete intake form with client if in meeting. Clicks 'Complete By Agent' button to enter intake form. Information needed:
• First Name
• Last Name

Client Invite
Invite sent by Agent. Information needed:
• First Name

Client Invite Email
Email Received by Client. Includes:
• Company Logo

Evaluation Form Step 1: Personal Info
Client enters in personal information. Including:
• Name (First & Last)
• Current Date
• Preferred Phone
• Date of Birth
• Email
• Street Address
• City
• State
• Zip
• Referred By

Evaluation Form Step 2: Current Plan
Client enters information on their current plan. Fields include:
• Are you currently on Medicare? (Yes, answer questions 1-6) (No, answer questions 7-12)
  • Answer has sub set questions for Yes or No
Other Information
• Are you losing employer coverage?
• Are you on Medicaid?
• Are you on low income subsidy (LIS)?
• Do you have Long-Term Care insurance?

Evaluation Form Step 3: Doctors
Client enters their doctors. Functions include:
• Dropdown for doctor specialty
• Find Doctor finder/search based on Name
• Checkbox on every doctor entered on whether they would switch

Evaluation Form Step 4: Medications
Client enters in their medications. Functions include:
• Search for drug name
• Dosage input
• Times per day taken input
• Generic checkbox

Dashboard

Accessibility Research

UX Problem

Medicare sales agents work with clients who are above 65 years of age. A webform will be sent to these clients where they be responsible for completing the multi-step flow.

What accessibility and usability standards need to be considered for aging demographics during user interface design?

UX Solution - Research Usability Standards

Based on the end-user demographics, accessibility became a crucial aspect of the UX and UI process. With the end-users falling into aging populations, we conducted extensive research into UX and UI patterns for 65+ individuals. This included reading academic papers, watching lectures and keynotes, and reading articles from industry though-leaders. An accessibility guide document was created to help guide the user interface designers.


Consideration #6: Pair Icons with Text

Icons can be too abstract for seniors. It is crucial to pair any icons with text labels.

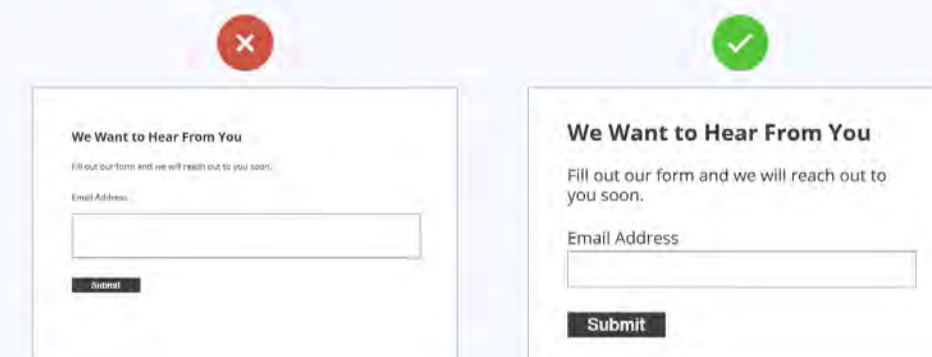|	
HOME	HOME
REPORT	REPORT
PROFILE	PROFILE
SETTINGS	SETTINGS
LOGOUT	LOGOUT

Consideration #4: Avoid Overwhelming Flows

Another consideration for UX/UI design for seniors is to avoid pages and flows that are cluttered and unclear. It is important to set expectations through clean sections, breaking up content, and status indicators.
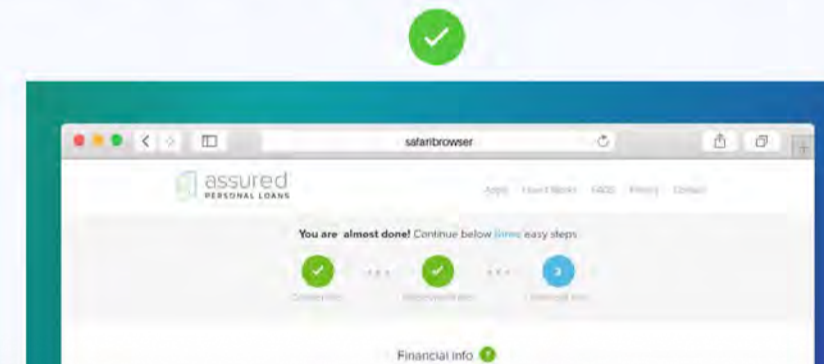
Consideration #1: Text Size

The size of text is important for aging populations. Small text size can be hard to read. It is recommended that all font sizes are above 16px.

We Want to Hear From You
Fill out our form and we will reach out to you soon.
Email Address:
Submit

We Want to Hear From You
Fill out our form and we will reach out to you soon.
Email Address
Submit

UX Flows & UI Prototyping

Once UX Research and Flows were completed, the design team moved on to User Experience and User Interface prototyping. This included exhaustive wireframing that supported full-fledge prototypes.

The AgentaHub dashboard was designed to give agents a comprehensive overview of their business by presenting snapshots of key metrics, schedules, and tasks.

After testing multiple concepts, we settled on a kanban board for the CRM lead management platform, which proved to be intuitive and actionable. Sales leads in each stage are clearly visible, and dragging and dropping them as they progress through the system makes it easy and fast to manage.

We also understood through our research that mobile support was essential. Agents are often away from their desktops, so we created clean mobile views of the entire platform to simulate a native app.
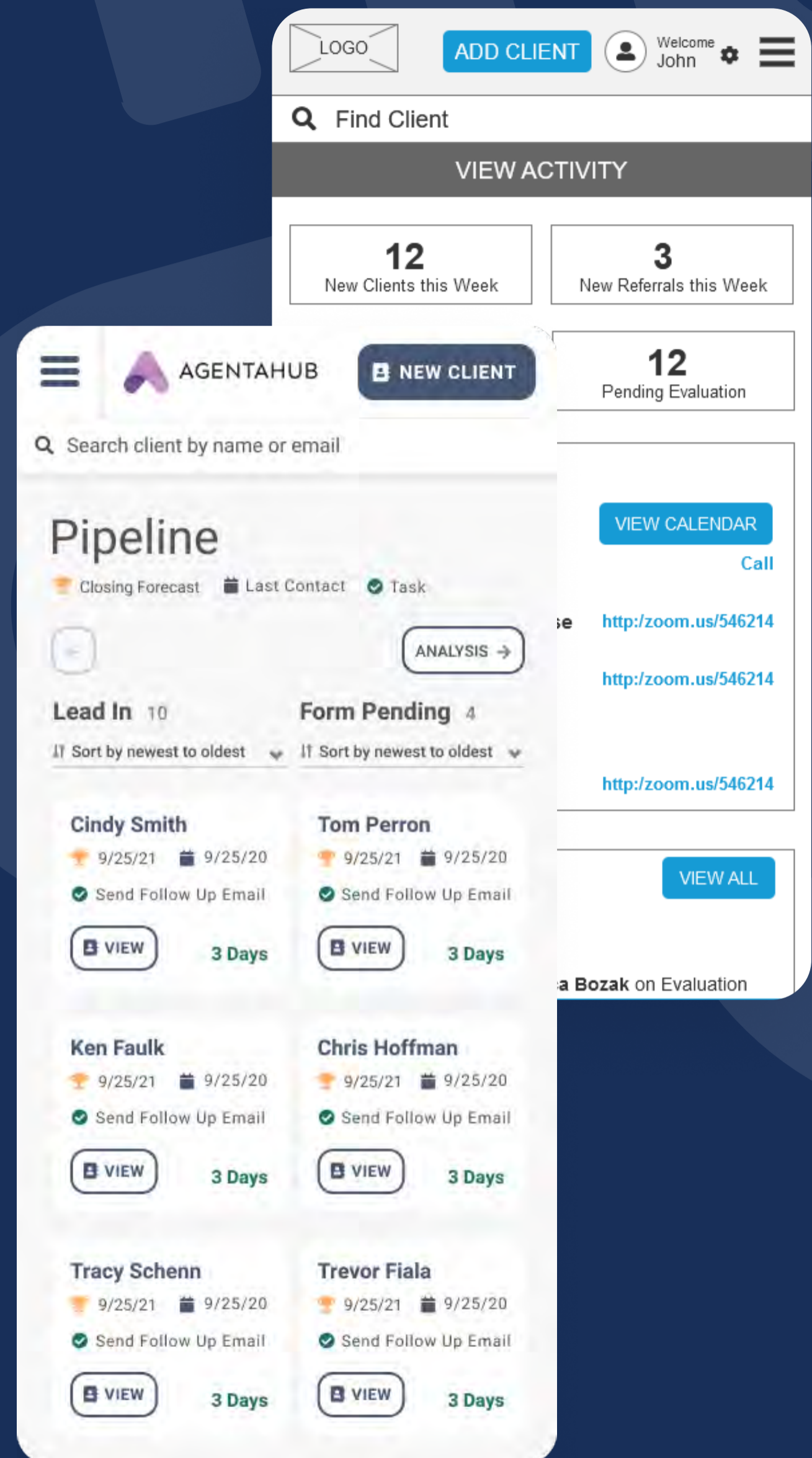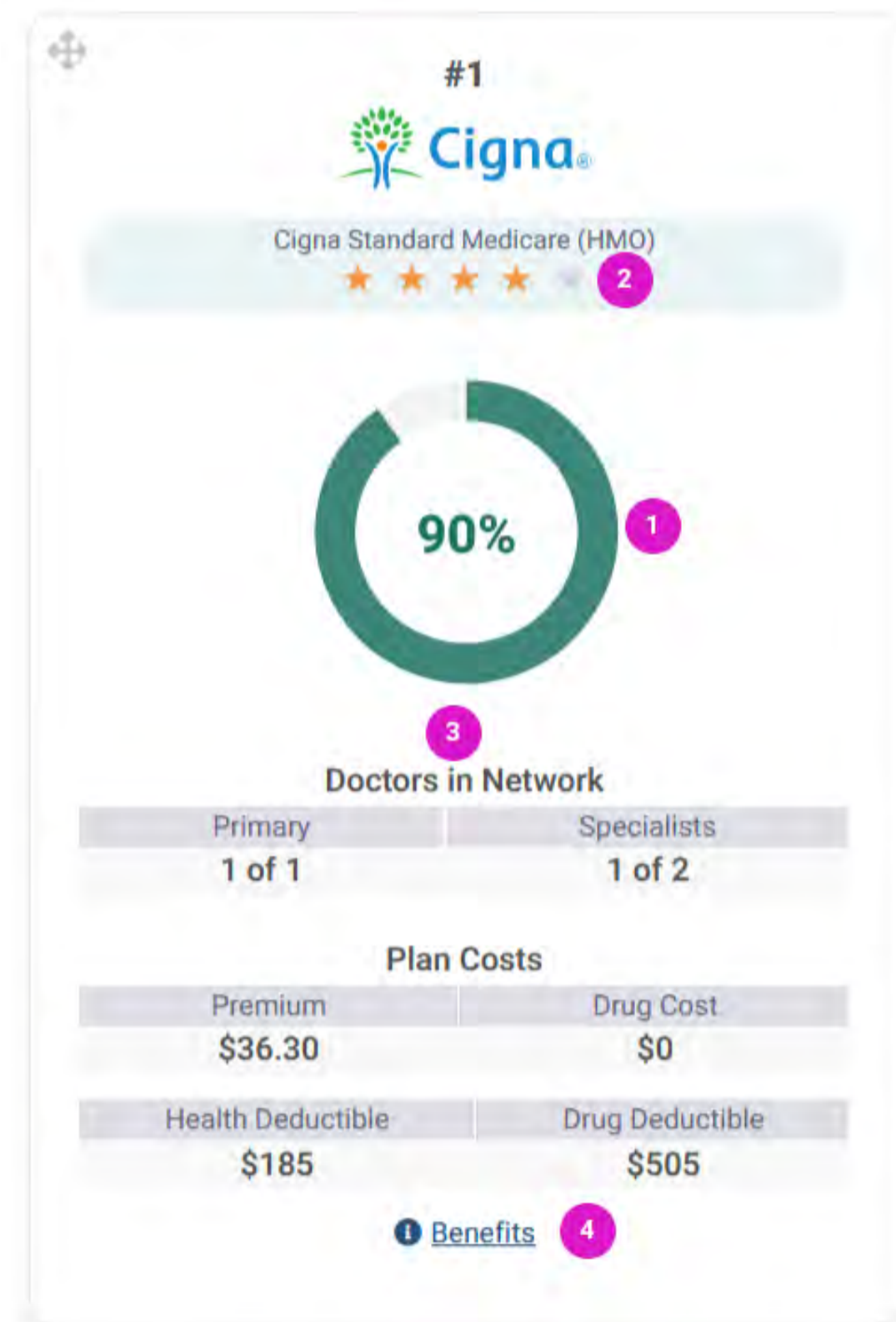
Medicare Plan Matching Made Easy

PLAN RECOMMENDATION ENGINE

Manually conducting extensive research for each and every prospect and client is slow and time-consuming. AgentaHub has addressed this major pain point in the sales process with a proprietary data-driven engine that matches the client to the right plan instantly. This cuts the time to find the right plan for a client from an hour or more to mere seconds. It also allows the agent to close the sale on the client call without having to hang up to do time-consuming research.

1 Plans are scored against a custom algorithm that factors in doctors in-network and drug costs. The patient's primary doctor is weighted more heavily than specialist doctors.

2 The star ratings are plan ratings that come from the Centers for Medicare & Medicaid Services (CMS).

3 The "Doctors in Network" and "Plan Cost" sections show the details on which physicians are in-network and the estimated costs for the different parts of the plan.

4 The "Benefits" link opens up an overlay panel that has full plan details to supply even more information.

#1

Cigna

Cigna Standard Medicare (HMO)

★ ★ ★ ★ **2**

1

90%

3

Doctors in Network

Primary	Specialists
1 of 1	1 of 2

Plan Costs

Premium	Drug Cost
$36.30	$0

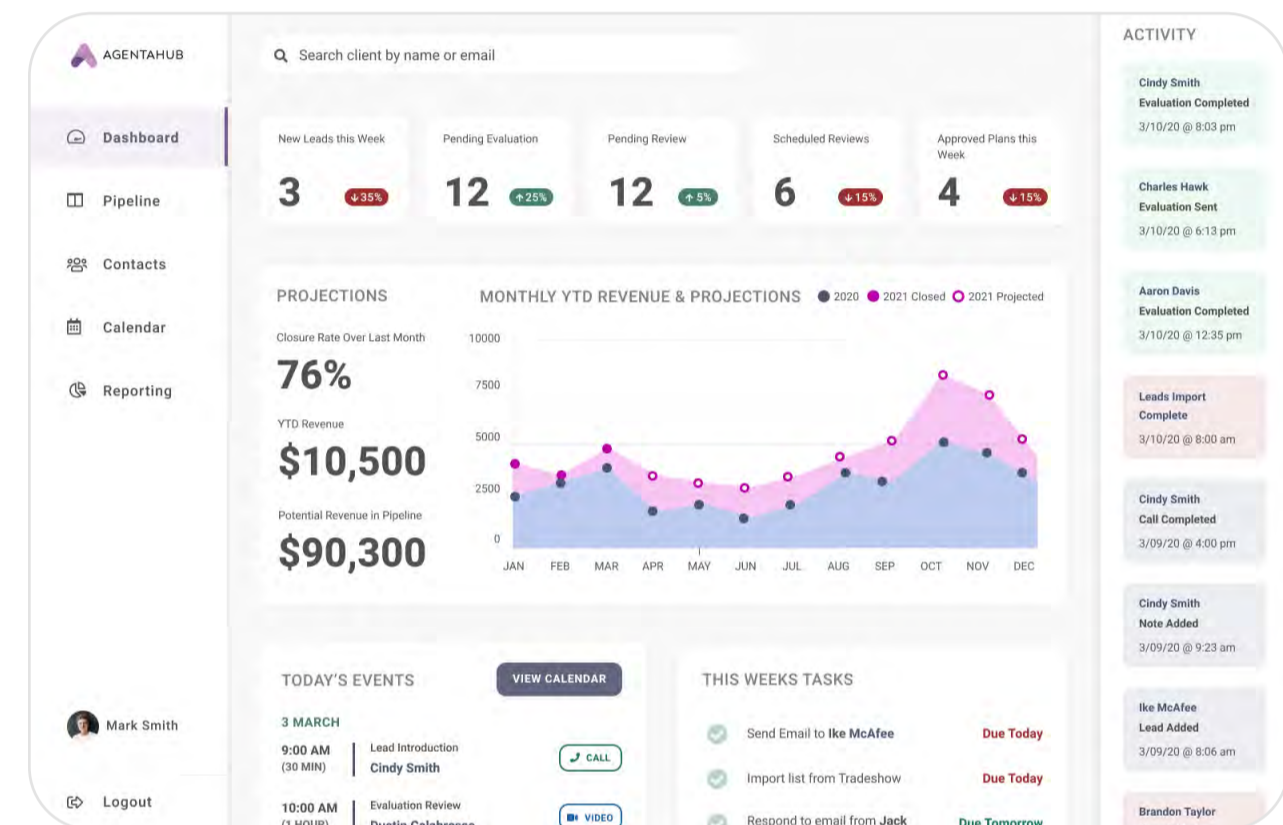| Health Deductible	Drug Deductible
$185	$505

ⓘ Benefits **4**

Leveraging UX/UI to Inform Agents

CRM DASHBOARD

AgentaHub has a robust CRM platform that is built just for Medicare insurance agents. It streamlines the collection of key data with workflows to eliminate errors, makes scheduling appointments easy, and tracks reminders and tasks.

It's the Hub in AgentaHub!

MANAGEMENT REPORTING AND ANALYTICS

Agents struggle to understand their metrics, which is how you measure the health of your business. AgentaHub gives agents the reports they need to understand their metrics including their sales pipeline, revenue projects, and trends such as closings.

A custom Solution Supported By Big Data

While the design and product teams worked on their main initiatives, the development team began working on the building out the core architecture platform. An API-first approach meant the application needed a protocol interface to connect the backend, front end, and data warehouse.

The development team also began evaluating data sources for doctor information and prescription drug prices. This was a major initiative of the platform. The result was a data set of millions of records that using a custom algorithm could be scored against to produce the Plan Recommendation Engine.
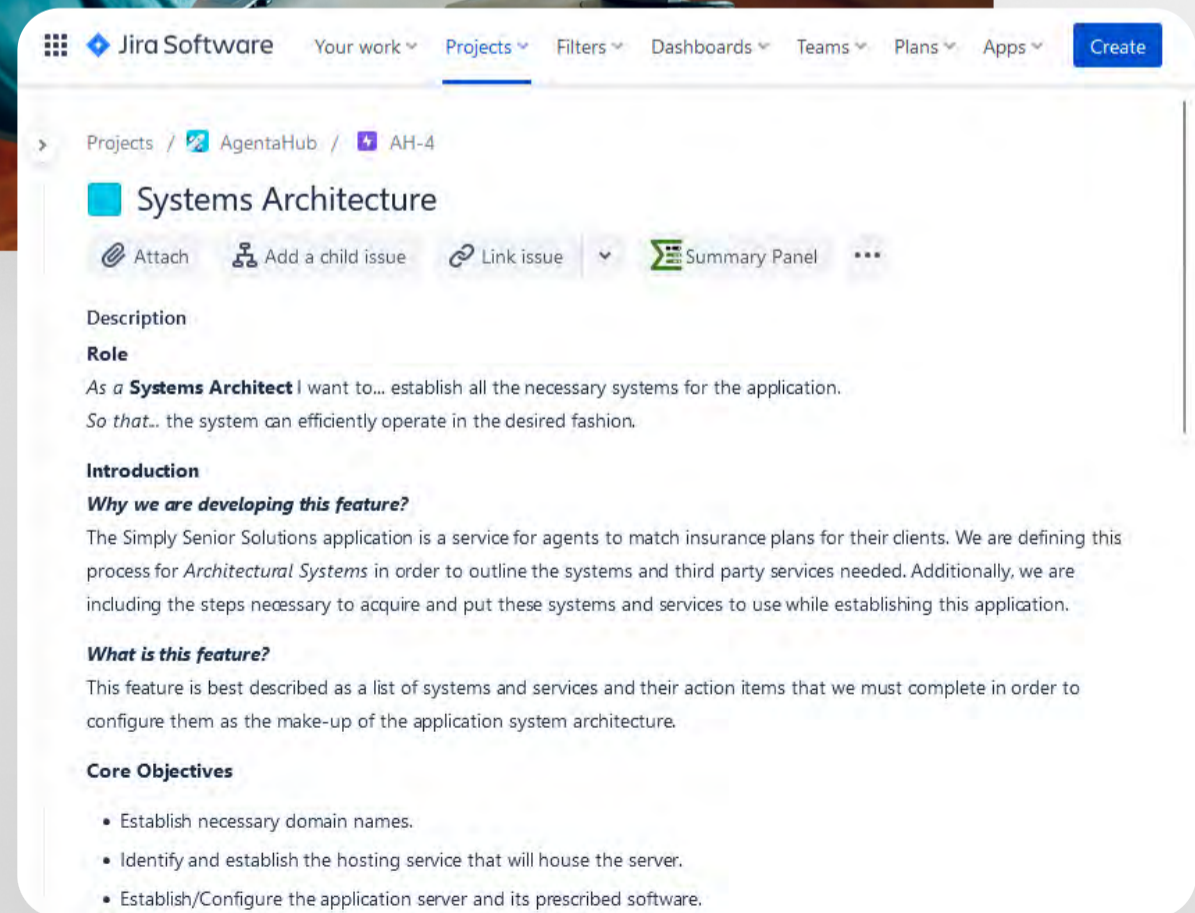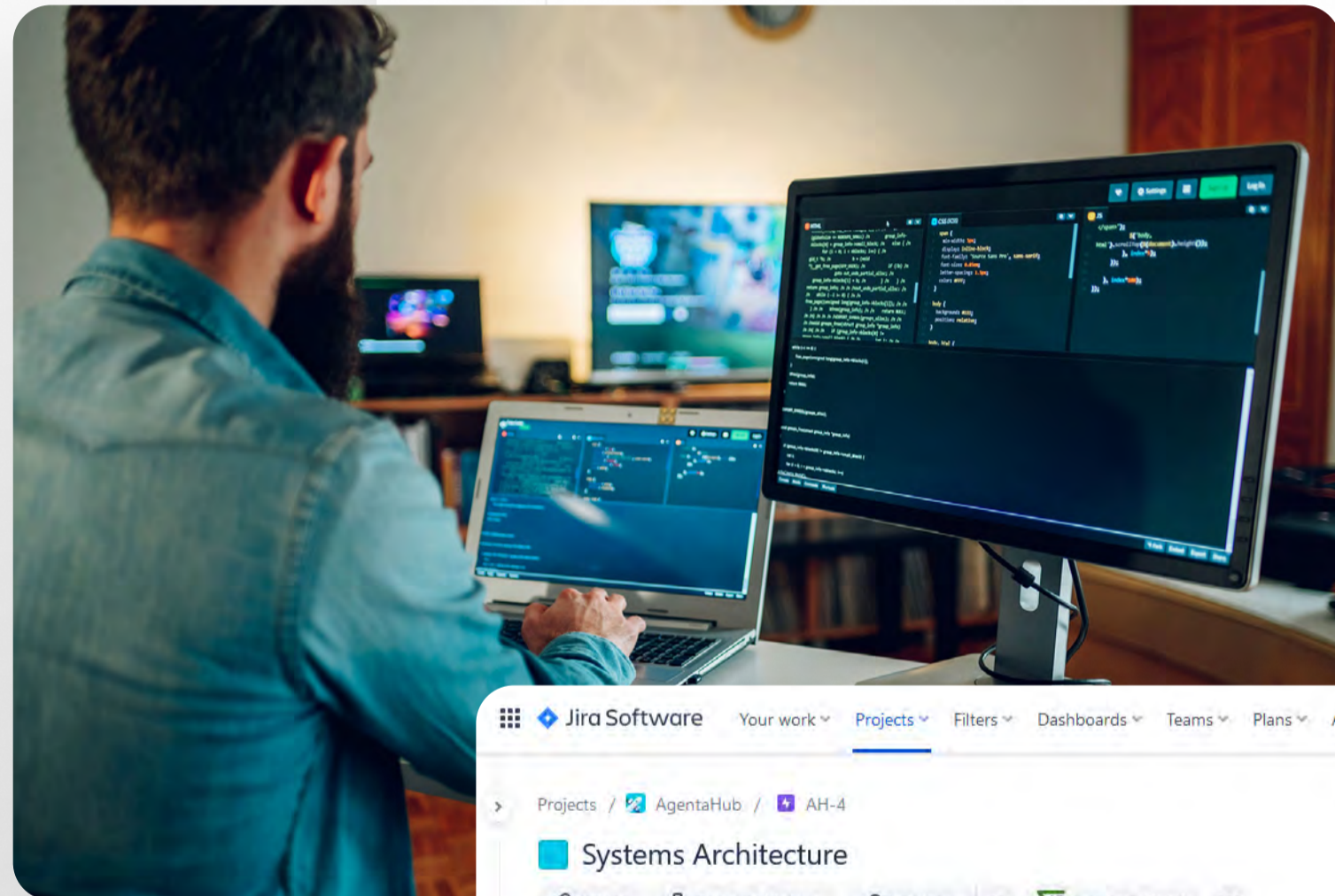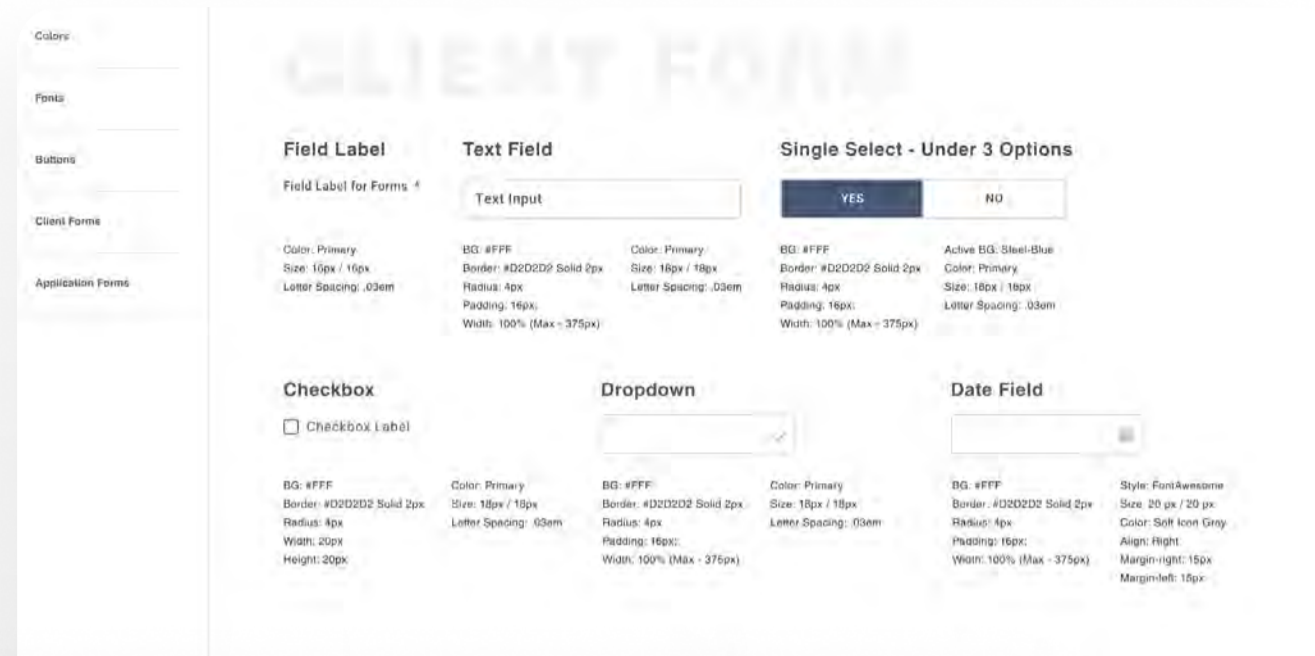
Development Solution Highlights
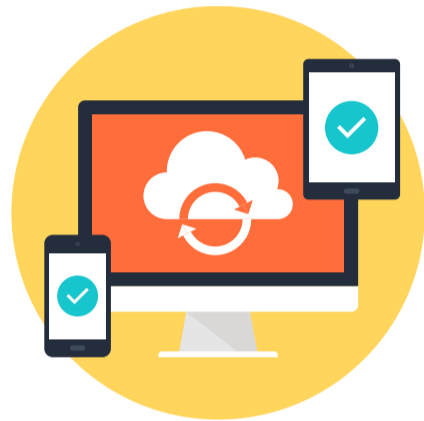
ETL Data Warehouse

To properly evaluate plans, AgentaHub needed to find data sources for up-to-date doctor information, and correct prescription drug pricing by Medicare plan and pharmacy. Our team evaluated dozens of data sources and ended up building an ETL platform that houses doctors and drug data. This data warehouse is constantly evolving and getting stronger as updates get released by the sources.

Custom Plan Scoring Algorithms

We worked to develop a custom scoring system of Medicare plans. Using the data warehouse, we developed an algorithm that takes a clients physicians and prescriptions and matches them on a scale of 1-100% to each Medicare plan available in their area. This ensures a client is matched with a plan that has their doctors in-network and lowest drug costs.

Backend and Frontend Development

The platform is built using an API-first methodology. The Laravel backend and React frontend are separated but connected via a robust and scalable API. This approach allows for rapid development of new features and the ability to onboard large number of new users.

AgentaHub has proven to be an effective tool for agents to streamline their workflows and processes.

KEY RESULT

Agents are closing more sales in less time, which gives them more time to work on their business, not just in it.

AgentaHub users are reporting saving over 10 hours in an typical week, and significantly more during the AEP.

Agents are now understanding their pipelines and analytics, making it easier to focus on what matters most.

> "
>
> Parux takes a genuine interest in helping their clients succeed. I have experienced this first hand. The Parux team have be integral in helping launch AgentaHub. They are always available to meet or chat regarding any questions or concerns I have had, and they have gone above and beyond "billable" time to make sure the AgentaHub launch was successful. Partnering with Parux has been a huge value to add to me both personally and professionally.

Dave Adams
AgentaHub Founder