



ACA Opportunity Discussion Guide



Leading the Agency Conversation

This document is designed to amplify agency conversations using the Opportunity Guide slide deck. It highlights where to focus, how to position the idea, and how to move the discussion toward action.

Before the Call

Who to Invite

Invite agency leadership, including the owner, principal, or sales leaders and top producers. Smaller, decision-oriented groups are more effective for initial conversations.

How to Position the Meeting

When scheduling the meeting, position the conversation simply: *"We want to walk through a practical way agencies are increasing revenue per ACA enrollment without changing their process."*

This keeps the focus on outcomes. Avoid framing it as product training or a new program rollout, as that can shift the conversation toward detail instead of opportunity.

How to Run the Call

1. Start with Their Perspective

"We've been talking with a few agencies about how ACA economics are shifting going into this year. Curious how last year's OEP felt from a revenue standpoint for your team?"

2. Align on the Problem

Look for indicators such as margin pressure, lower revenue per enrollment, or more complex client conversations. If these aren't present, keep the discussion high-level. If they are, the opportunity will be more relevant.

3. Introduce the Core Idea

"Agencies are consistently increasing revenue by introducing accident coverage into the ACA conversations they're already having."

Reinforce the concept:

- Same clients
- Same conversation
- More revenue per enrollment

4. Use the Deck to Guide the Conversation

The Opportunity Deck provides a structured way to walk through the model. Move through it in order, using it to frame the discussion and connect the opportunity to the agency's business and OEP performance.

5. Position the Solution Clearly

"This helps cover the out-of-pocket costs clients are already concerned about."

Keep the explanation straightforward and avoid going deep into product detail at this stage.

6. Anchor It in Their Business

"Roughly how many enrollments do you handle during OEP?"

Connect the revenue impact to their volume to make the opportunity tangible.

7. Address Questions Directly

Common themes may include:

- Time during OEP → Position as a quick addition, not a new process
- Agent adoption → Reinforce early setup and pre-OEP training
- Client demand → Tie to existing conversations around out-of-pocket costs

Keep responses grounded in how agencies operate today.

8. Move to Next Steps

If there is interest, the path forward is straightforward: contracting, agent training, and pre-OEP reinforcement

Emphasize timing: *"This is most effective when it's in place ahead of OEP."*

9. Close with Clarity

"If this feels like a fit, the next step is getting your team set up and ready ahead of OEP."

From there, align on next steps, including contracting conversations, training sessions, and follow-up planning.



After the Call

Follow up within 24–48 hours, recap the opportunity at a high level, and confirm next steps

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