



# CLIENT APPRECIATION PROGRAM

## 1) Request Referrals From Client

- Utilize A “Pay It Forward” Approach
- Have Client Complete Referral Form
- Explain CHM’s “Bring a Friend” Program
- Ask Client to Call Referrals for Introduction
- Ask Client to Call and Thank Whomever Referred Them

## 2) Submit Copy of Completed Referral Form to Agency

- Referrals Qualify Agent for Wheel of Fortune

## 3) Contact Referrals/Schedule Appointments/ Enroll New Clients

## 4) Submit Copy of New Applications to Agency for AV Credit

## 5) Submit Referral Reward Voucher to Agency for Each New Enrollment Completed From Referral.

## 6) Agency Will Mail Client Appreciation Letter with a \$100 Visa Card to Client Who Supplied Referral for Each Successfully Submitted Application.

- Personalized Letter Signed by the Agent
- Copy of Letter will be Emailed to the Agent
- Blank Referral Form will be Included in the Letter

## 7) Agent to Call the Client to Again Thank Them...And to Request Additional Referral; Life Insurance; etc.

### **The Fine Print**

→ Only One Visa Card will be Issued per Family Enrolled.

- Ex: If Spouse’s Enroll in Different Plans, Only One (1) Reward Card will be Issued.

→ Enrollment Must Include Supplemental Coverage. A “Stand-Alone” CHM Enrollment Does Not Qualify.

→ Rewards will Be Mailed Upon Issue of Plan.