

# The Agency Owner's Essential Stack

15 platform capabilities that will define how independent Medicare agencies grow, retain, and compete over the next three years.

AgentzSee ■ agentzsee.com ■ Powered by Scenario3

If you run an independent Medicare or health insurance agency with a team of agents underneath you, the pressure on your book is only going to increase.

CMS is tightening standards. Star ratings are moving to outcome-based metrics. Clients are getting harder to retain. And your agents need more support than they're getting from a spreadsheet and a phone.

**The agencies that will grow through this are not the ones with the most agents. They're the ones with the best infrastructure underneath those agents.**

These are the 15 tools that make that infrastructure real.

## VISIBILITY & CONTROL

### 01 Centralized Agency Dashboard

VISIBILITY

One view across your entire agency. Every agent, every client, every campaign — without logging into each sub-account separately. You see the whole book at a glance, in real time.

### 02 Sub-Account Management for Downline Agents

CONTROL

Each agent operates inside their own contained environment — their contacts, campaigns, and conversations stay separate. You stay above it all, with access to everything. Agent turnover no longer means lost data.

### 03 At-Risk Client Identification

RETENTION

The platform flags clients showing signs of churn before they leave — missed touchpoints, upcoming renewals, zero engagement. Your agents know who to call before it's too late. This is the feature that pays for itself.

### 04 Book Health Scoring

RETENTION

A live score for your agency's overall retention health. Growing. Stable. Leaking. You know the answer at any moment — not at the end of AEP when it's too late to act.

## AUTOMATION & SEASON READINESS

## 05 AEP / OEP Automated Communication Sequences

AUTOMATION

The entire annual enrollment season is pre-built and pre-scheduled. Every client in the book gets the right message at the right time — across every channel — without you managing execution manually.

## 06 Multi-Channel Sequence Coordination

AUTOMATION

SMS, email, and ringless voicemail fire in coordinated sequence, automatically. You set the cadence once. It runs across your whole downline, every season, without a second thought.

### PERFORMANCE & ACCOUNTABILITY

## 07 Downline Reporting

PERFORMANCE

Who's performing. Who's slipping. Which agents have at-risk clients and where renewal season exposure lives across your team. Data replaces gut feel — and replaces the phone calls you'd otherwise be making to find out.

## 08 Agent Performance Tracking

PERFORMANCE

Enrollment trends, communication activity, and client retention rates per agent. Know which producers are carrying the book and which need coaching — before the book shows the damage.

## 09 Shared Contact Pools with Permission Layers

CONTROL

Leads and clients managed at the agency level, with visibility and edit rights controlled by role. When an agent leaves, the relationship stays with your agency — not with them.

## 10 Territory-Based Lead Routing

EFFICIENCY

New leads auto-route to the right agent based on geography or assignment rules. You stop being the dispatcher. Leads reach the right producer in minutes, not days.

### BRAND, SUPPORT & COMMUNICATION

## 11 Co-Branded Agent Onboarding

BRAND

Your agents come onto the platform under your brand — your name, your agency identity. When they talk to clients, they represent you. The system reinforces that from day one.

## 12 Team Permissions and Access Controls

CONTROL

Admins, agents, and staff see exactly what they need — nothing more. Your data stays protected. Your clients stay yours. You stay in control of the whole operation.

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### Done-For-You Platform Setup

SUPPORT

You don't build anything. Your agency goes live fully configured — your branding, your agents, your sequences ready on day one. No tech team required. No learning curve for you.

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### Ongoing Platform Management

SUPPORT

AgentzSee runs the platform for your agency so you're not IT support for your own agents. Updates, configuration changes, and maintenance — handled. You run the agency. We run the infrastructure.

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### Unified Conversations Inbox

COMMUNICATION

Every SMS, email, DM, and voicemail across your agency — in one inbox. You or your admin can oversee client communication across the entire book without switching between platforms or chasing agents for updates.

## Ready to see what this looks like for your agency?

AgentzSee is a done-for-you Medicare agent retention and communication platform built exclusively for independent agencies like yours. We configure it. We manage it. You run the agency.

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