



 **PennGlobal**
AN INTEGRITY  COMPANY

RETAIL MODEL



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Provider/Retail/Community Engagement Introduction:

Whether it's a clinic, pharmacy, storefront, or a town meeting, relationships are vital to sales success. In this business, like many others, a referral system is key to catapulting your career to the next level. This model is intended for anyone who is looking to make their product offerings and services more sought after on a high volume level.

The Main Objective: The goal of this model is to help agents become more confident in establishing relationships with local/regional organizations that cater to the prospects sought after for the products you specialize in. The Main Attraction: Value-added Services. Be sure to embody the notion of your total offering. Whether it's a provider's office, retail location, or a community meeting, your sole purpose of presence is to be a "value-added service" to the organization. Being seen as a resource agent is more attractive and brings more volume than being seen as a sales agent.

Example 1: Provider offices need a resourceful individual to answer questions patients may have about their insurance, i.e., copays and deductibles.

Example 2: Many large retailers either incorporate a pharmacy or accept ancillary benefits included in many health plans; however, the staff is unaware of limitations and allowances allocated amongst the specific plan and market.

Example 3: Community groups seek correct information and education. With all the phone calls and TV advertisements, it is very refreshing to get facts from a local individual face-to-face. Engulfing yourself with an influx of questions and concerns about health coverage and qualifications puts you in an advantageous position to create new sales.

The Approach: First impression is everything. It is vastly important to be presentable, professional, and knowledgeable about your purpose in serving the organization. Share insights, misconceptions, and solutions with the leadership on how your offerings would enhance satisfaction with the environment

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"Please note that the information provided here serves as general guidelines and should not be considered as fixed timelines for progress. Each individual's journey is unique, and personal circumstances, abilities, and experiences can significantly influence the pace of development. We encourage you to use this as a flexible framework and adapt it to your new agent's specific needs."



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Relationship Retention: It is vital to show consistency and persistence when given an opportunity. Consistently, being visible and available are the key metrics of building a referral partnership. Showing up on time every time shows commitment and naturally aids those who do what they say and say what they mean. Persistence, following up, and reporting your results will prove your effectiveness, which benefits both parties. With this level of dedication, in due time. You will seemingly become a part of the workforce that you're with. Eventually, all staff members will know who you are, what you do, and how satisfied your customers are. This will eventually result in referrals coming from numerous sources as the word spreads throughout the workforce.

Patience: Believe in what you do, know your products, and stay engaged. Every approach will not result in an opportunity, just like every presentation won't be a sale. However, if you keep up the effort and commit yourself to servicing, opportunities will become inevitable. After an opportunity/relationship is established, do not rush to the sales goal. Focus on building a strong foundation in the partnership and allow sales to flow in genuinely. This strategy can result in a snowball effect of interactions that can lead to a presentation ultimately resulting in sales.

*All scheduled CMS sales events must be registered through a RTS CMS Carrier



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