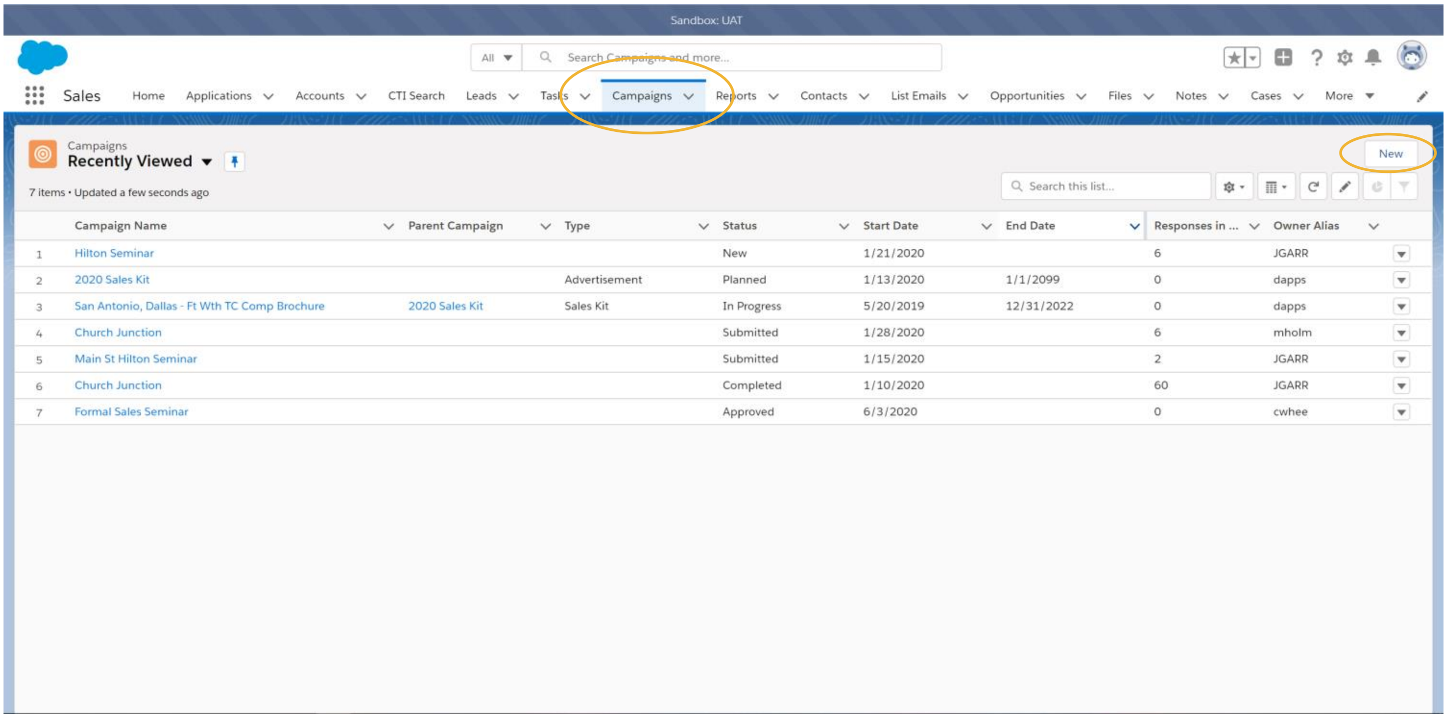
Job Aid: Create a Sales Event and Submit for Approval

Assign to: FSRs and NBDRs

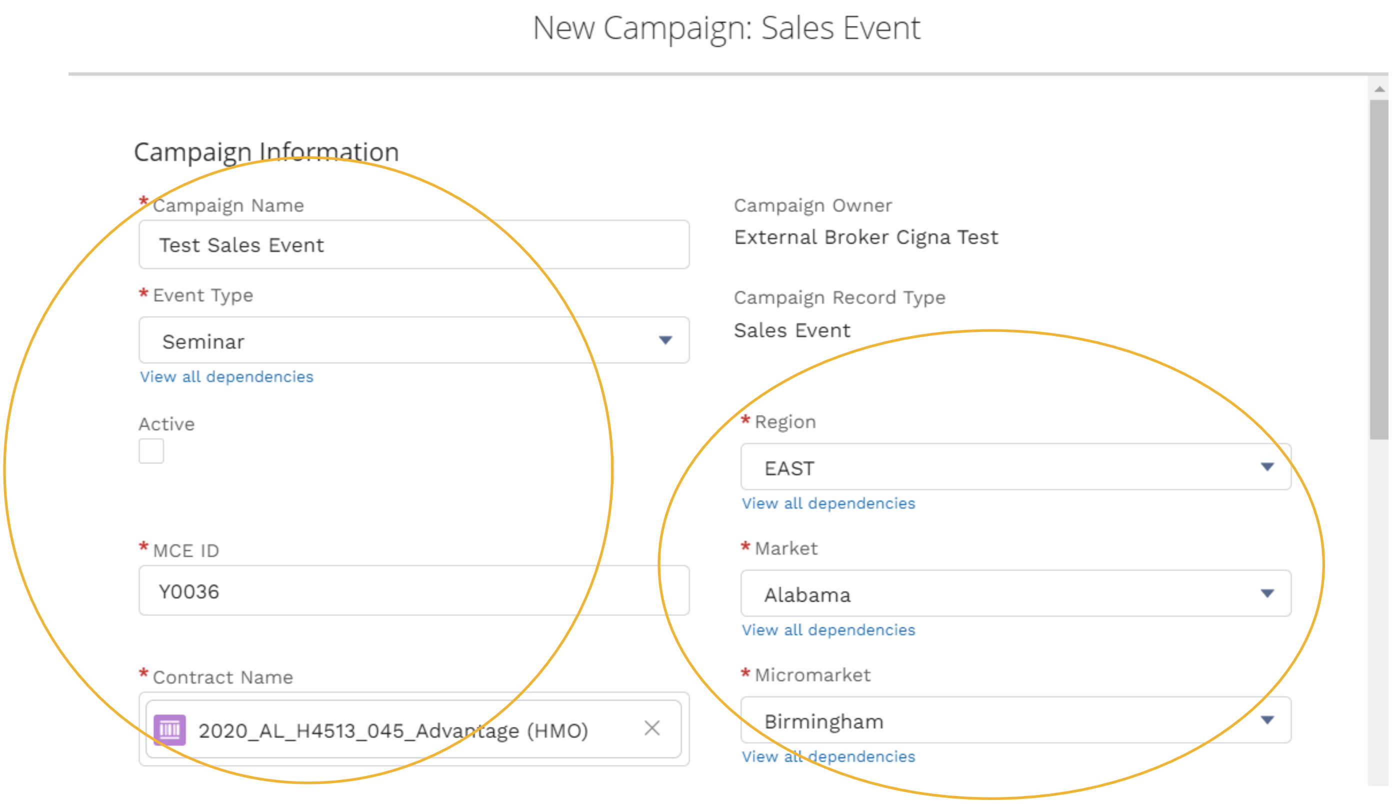
Purpose: To create a Sales Event in Salesforce, and Submit for Approval.

Create a Sales Event Record

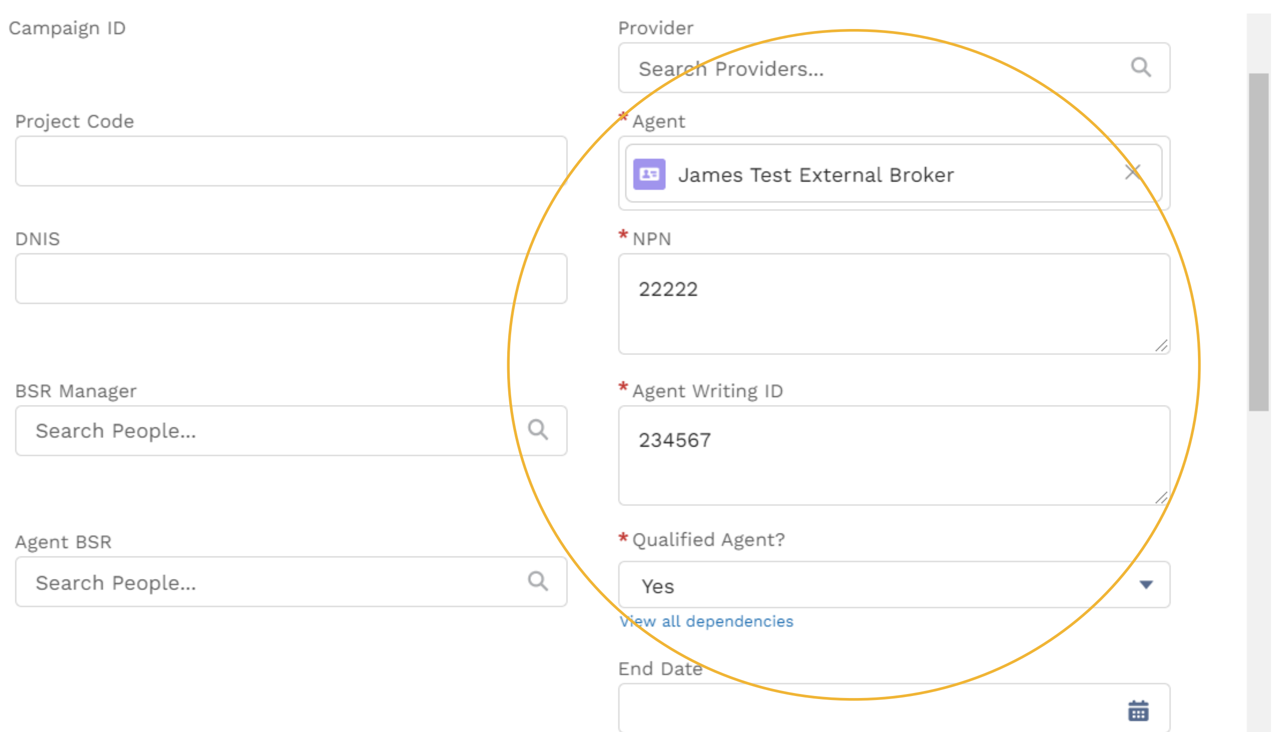
1. Click on the Campaigns tab on the Navigation Menu.
2. Click on the New button in the upper right-hand corner on the Record Controls Menu to launch the record creation form.



3. Fill out the required details to create a new record and click Save. Required fields are marked by a red asterisk
4. Add a Campaign Name
5. Select the Event Type
   a. Informal
   b. Educational
   c. Seminar
6. Add the Product to be discussed in the Contract Name
   a. This is a search able field type
   b. Type in the Name and select from the list or hit enter to navigate to the search page
7. Select the Region, Market, and Micromarket for the drop options



8. Add your name as the Agent
9. Add your NPN
10. Add your Agent Writing ID
11. Select ‘Yes’ in the Qualified Agent drop down



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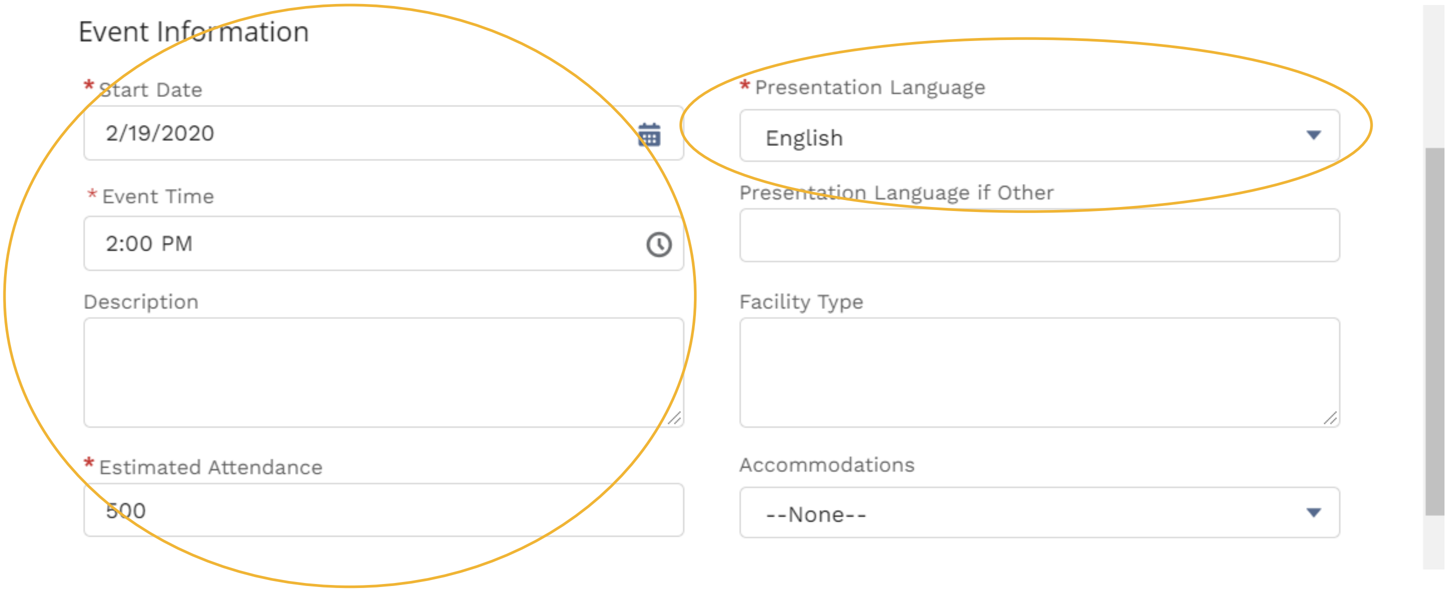
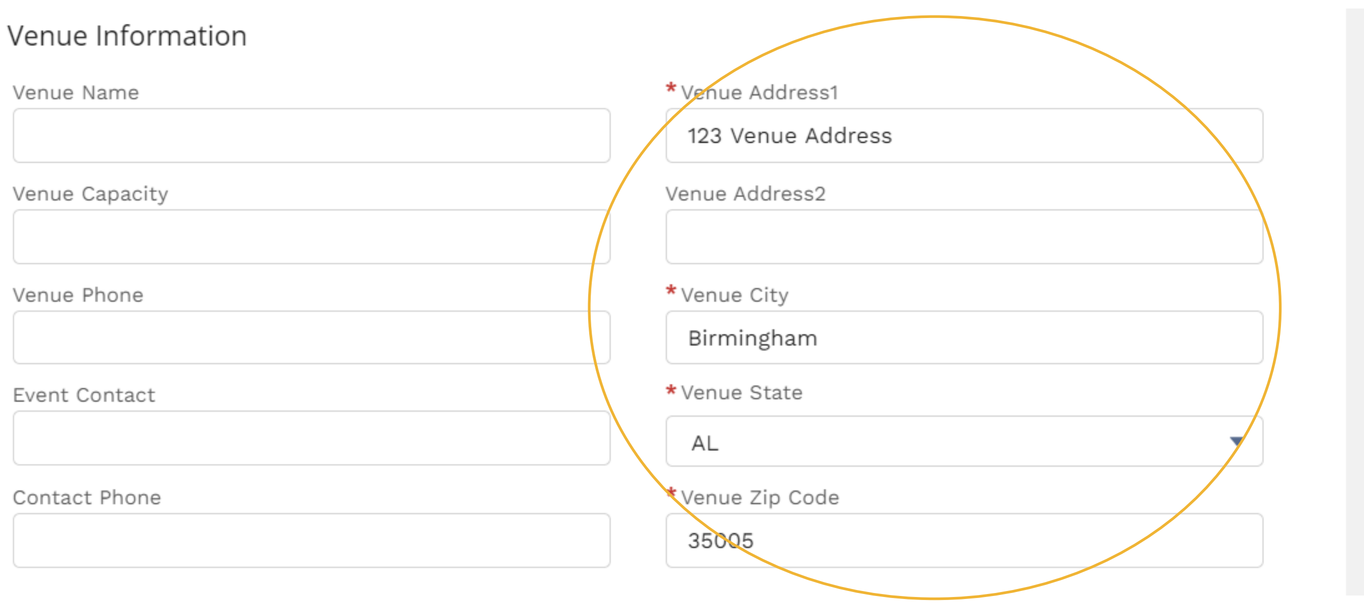
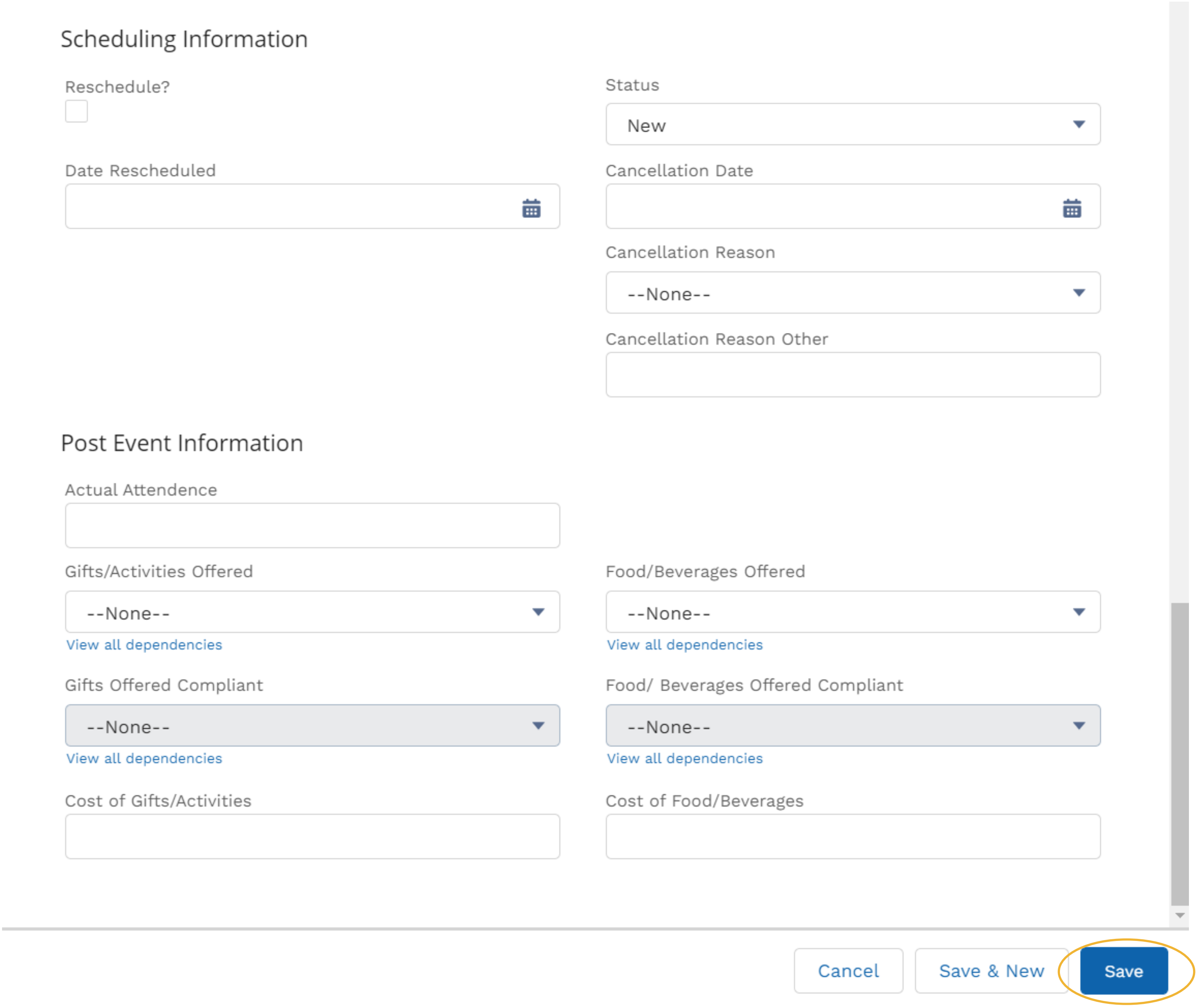
12. Enter the Event Information
    a. Start Date
    b. Event Time
    c. Estimated Attendance
    d. Presentation Language



13. Capture the Venue Information
    a. Venue Address 1
    b. Venue City
    c. Venue State
    d. Venue Zip Code

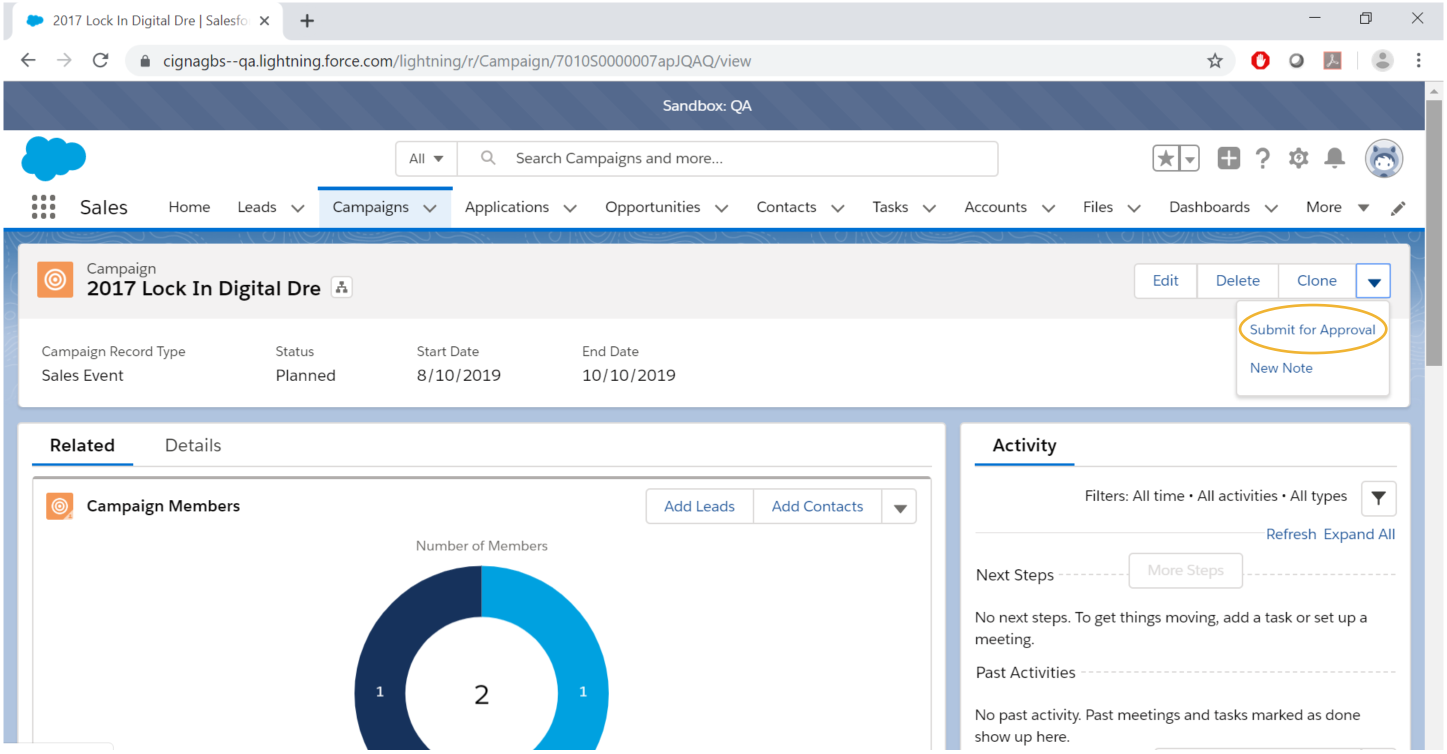


14. Click Save

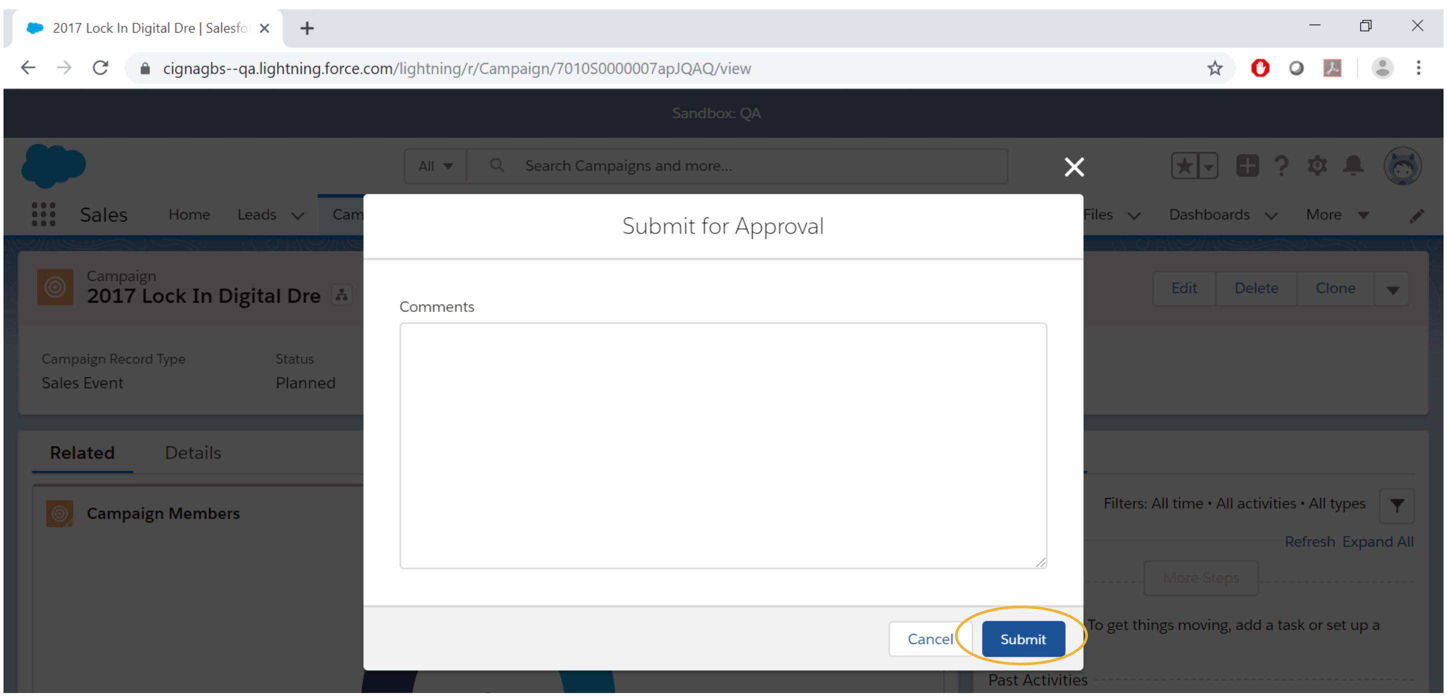


Submit a Sales Event for Approval

1. Click on the Campaigns tab in the Navigation Menu.
2. Click on the Campaign you want to access to view the Campaign record page.
3. Click the Submit for Approval button in the Records Control Menu on the Campaign record.



4. Enter any relevant comments to the Approval Process and click Save.



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Sales Event Approval Process

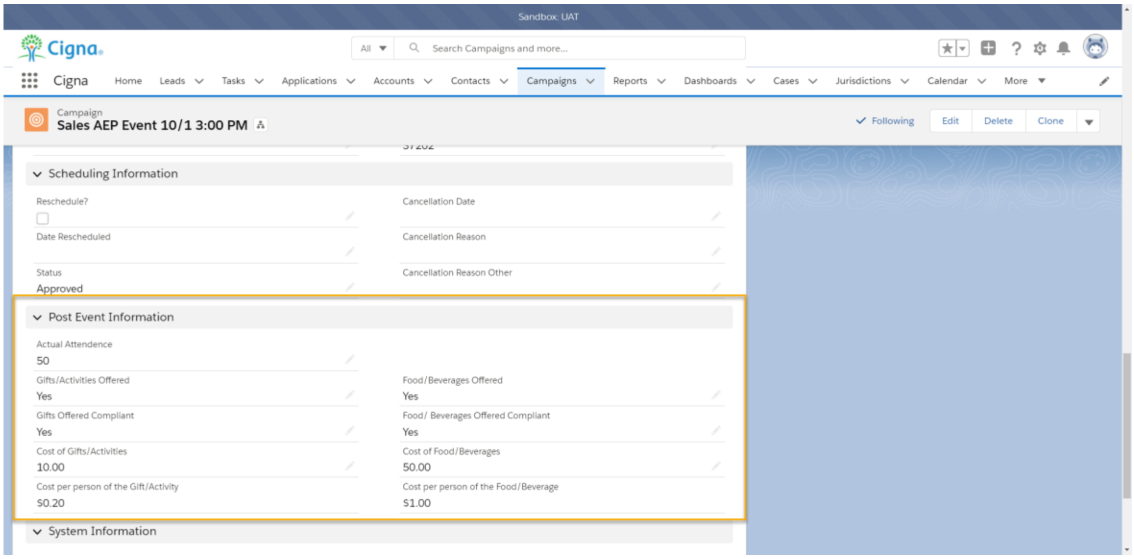
Each Sales Events that is submitted will need to be approved. Event status will update accordingly to the following conditions:

- New: when agent creates new sales event
- Submitted: when agent has saves new sales event and submitted for Manager approval
- Approved: when Manager approves sales event
- Rejected: when Manager rejects sales event
- Completed: when agent completes required fields in 'Post Event Information' section on sales event

Update Event Information

Update post-event information including Actual Attendance, Gift/Activities and Food/Beverages offered within two business days after conducting an event where the Formal Sales Presentation is utilized. In addition, agents are responsible to submit educational event Gift/Activities and Food/Beverage via Salesforce by the 15th of the month prior to the month of the event.

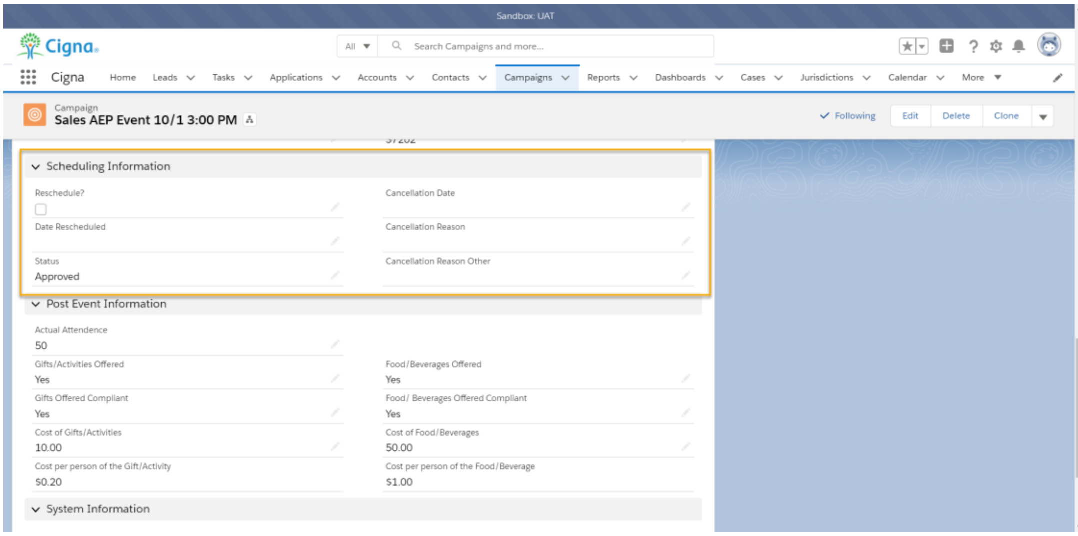
1. Access the Sales Event record.
2. On the Details List scroll down to the Post Event Information.
3. Click on the edit pencil icon next to the field to edit.



Re-Schedule and/or Cancel a Sales Event

If re-scheduling/cancellations occur, the agent must update their Sales Event in Salesforce following the below steps. Agents must also notify their Sales Manager prior to rescheduling the Sales Event

1. Navigate to the Sales Event
2. On the Details List scroll down to the Scheduling information section.
3. Click the edit pencil icon next to the field to edit.
   a. If re-scheduling check the box and update the rescheduled date
   b. If canceling enter the cancelation date and select the reason
4. Save the edits to apply.

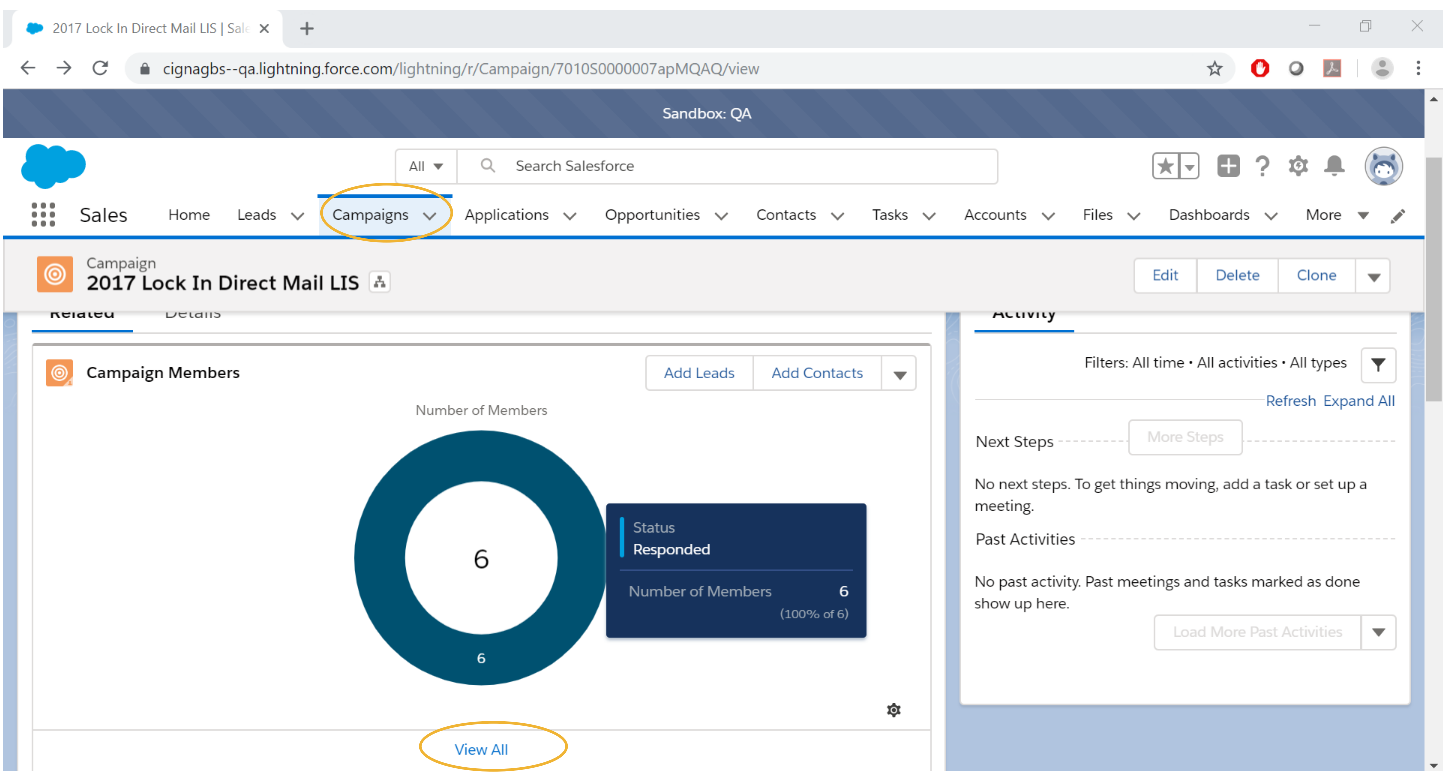


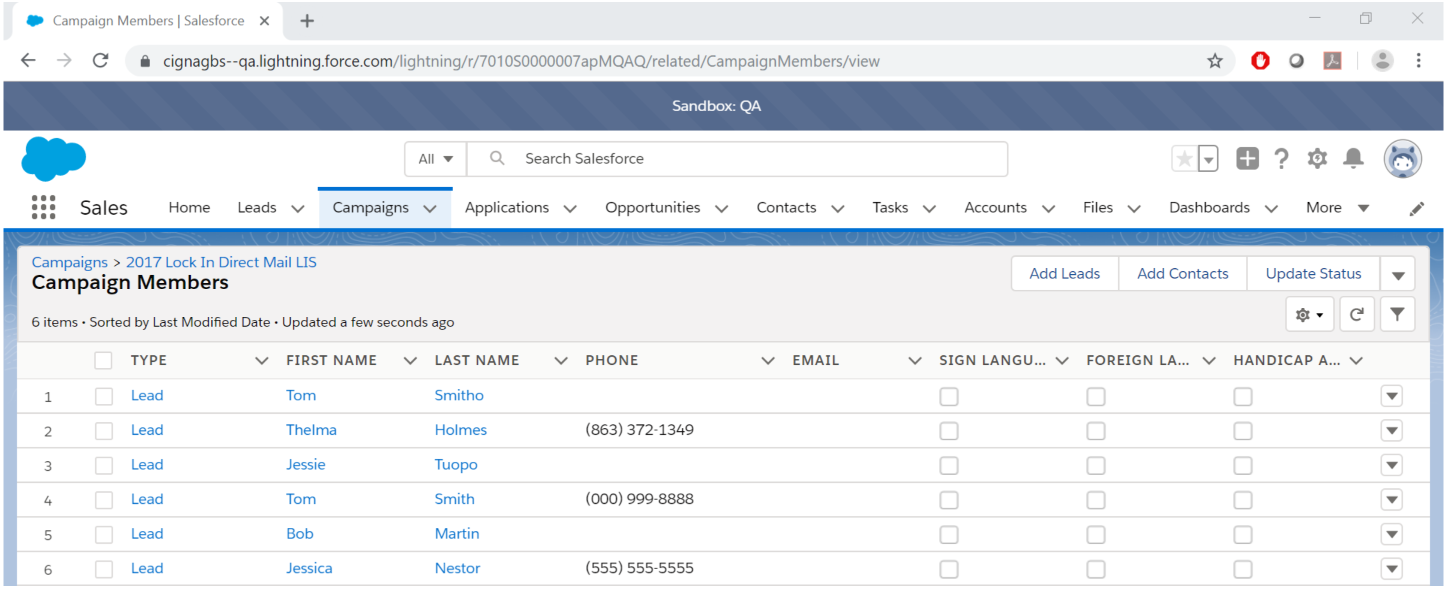
Track and Capture RSVPs for Sales Event

After creating a sales event (must be type=seminar), the agent can add leads and manage RSVPs on the RSVP related list.

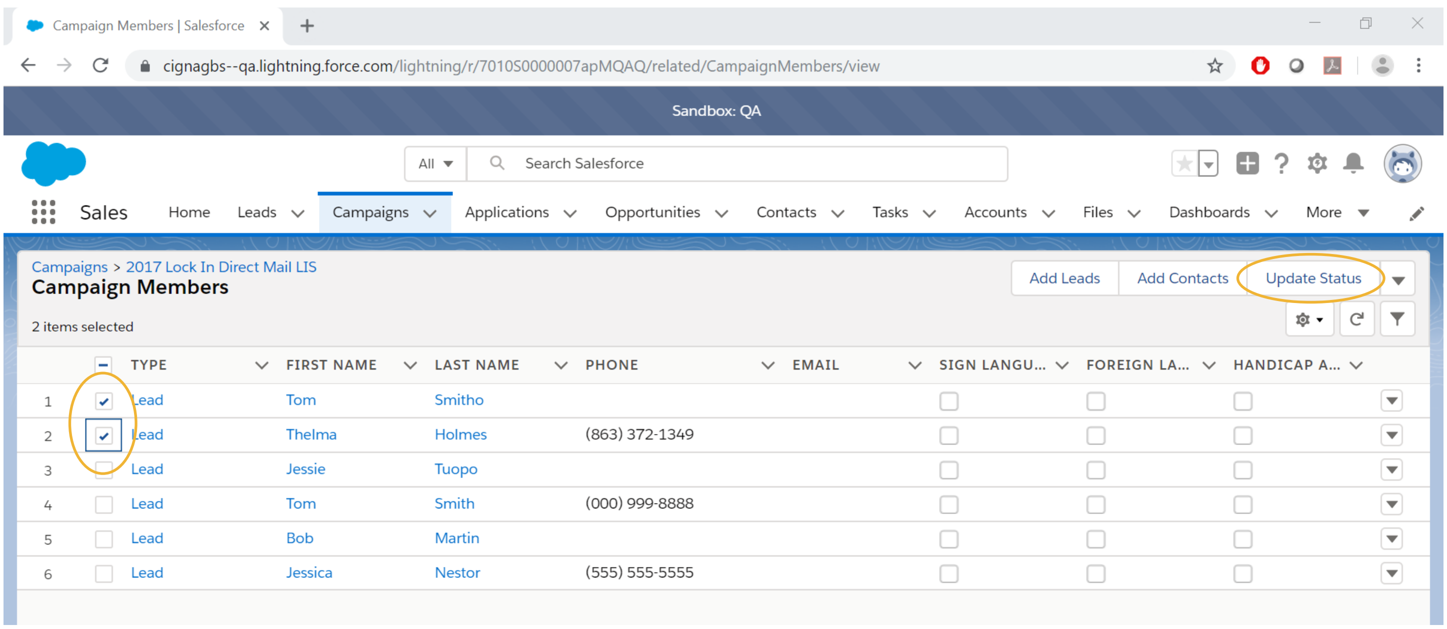
To change a RSVP from Responded to Attended (or vice versa):

1. Click on the Campaigns tab in the Navigation Menu.
2. Click on the Campaign you want to access to view the Campaign record page.
3. Click on the Related tab on the Related/Details component.
4. Scroll down to the Campaign Members component and click View All.

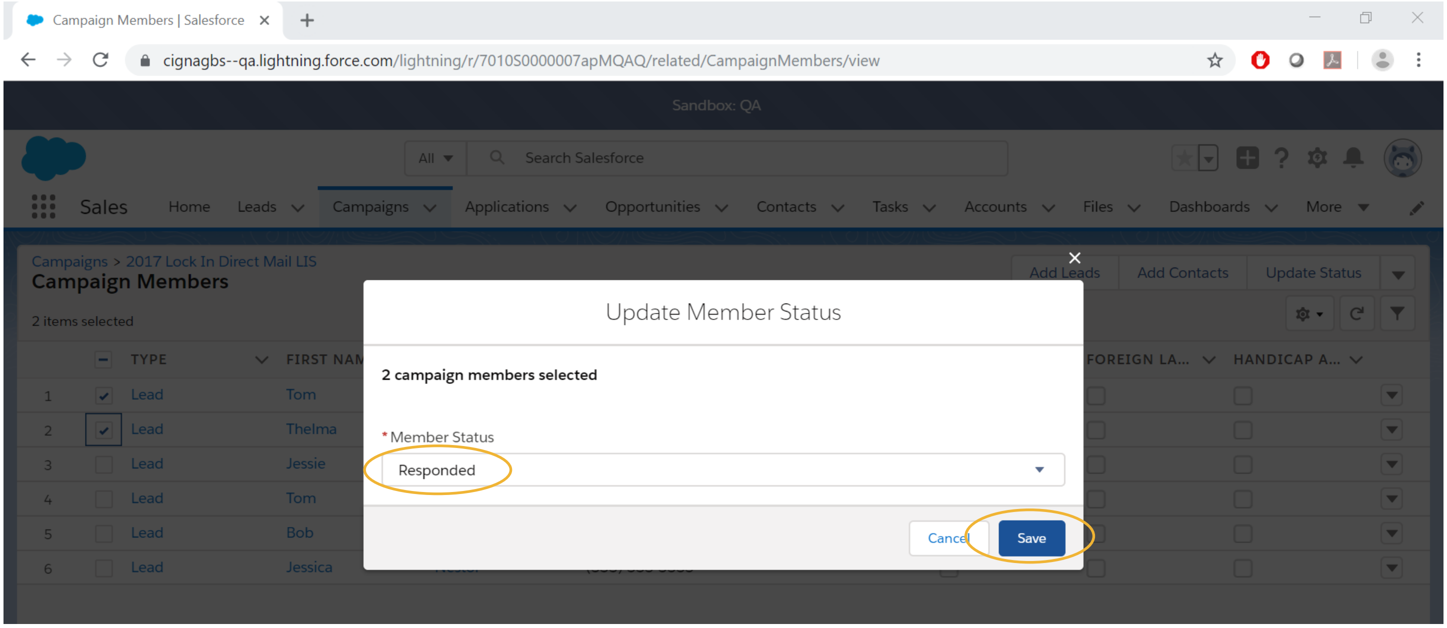




5. Check the Contacts or Leads to update and click on the Update Status button.

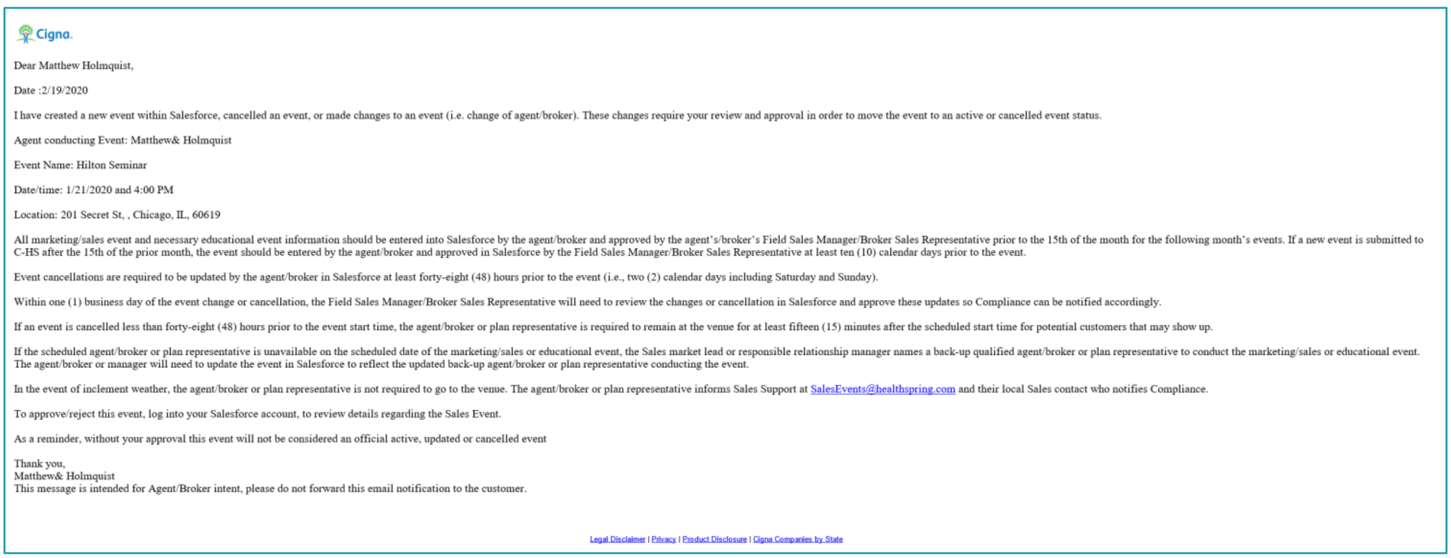


6. Select the desired Status and click Save.



Manager Approval of a Sales Event

1. Manager receives an email notification that action is required to approve the Sales Event.



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Dear Matthew Holmquist,

Date :2/19/2020

I have created a new event within Salesforce, cancelled an event, or made changes to an event (i.e. change of agent/broker). These changes require your review and approval in order to move the event to an active or cancelled event status.

Agent conducting Event: Matthew& Holmquist

Event Name: Hilton Seminar

Date/time: 1/21/2020 and 4:00 PM

Location: 201 Secret St, , Chicago, IL, 60619

All marketing/sales event and necessary educational event information should be entered into Salesforce by the agent/broker and approved by the agent's/broker's Field Sales Manager/Broker Sales Representative prior to the 15th of the month for the following month's events. If a new event is submitted to C-HS after the 15th of the prior month, the event should be entered by the agent/broker and approved in Salesforce by the Field Sales Manager/Broker Sales Representative at least ten (10) calendar days prior to the event.

Event cancellations are required to be updated by the agent/broker in Salesforce at least forty-eight (48) hours prior to the event (i.e., two (2) calendar days including Saturday and Sunday).

Within one (1) business day of the event change or cancellation, the Field Sales Manager/Broker Sales Representative will need to review the changes or cancellation in Salesforce and approve these updates so Compliance can be notified accordingly.

If an event is cancelled less than forty-eight (48) hours prior to the event start time, the agent/broker or plan representative is required to remain at the venue for at least fifteen (15) minutes after the scheduled start time for potential customers that may show up.

If the scheduled agent/broker or plan representative is unavailable on the scheduled date of the marketing/sales or educational event, the Sales market lead or responsible relationship manager names a back-up qualified agent/broker or plan representative to conduct the marketing/sales or educational event. The agent/broker or manager will need to update the event in Salesforce to reflect the updated back-up agent/broker or plan representative conducting the event.

In the event of inclement weather, the agent/broker or plan representative is not required to go to the venue. The agent/broker or plan representative informs Sales Support at SalesEvents@healthspring.com and their local Sales contact who notifies Compliance.

To approve/reject this event, log into your Salesforce account, to review details regarding the Sales Event.

As a reminder, without your approval this event will not be considered an official active, updated or cancelled event

Thank you,
Matthew& Holmquist
This message is intended for Agent/Broker intent, please do not forward this email notification to the customer.

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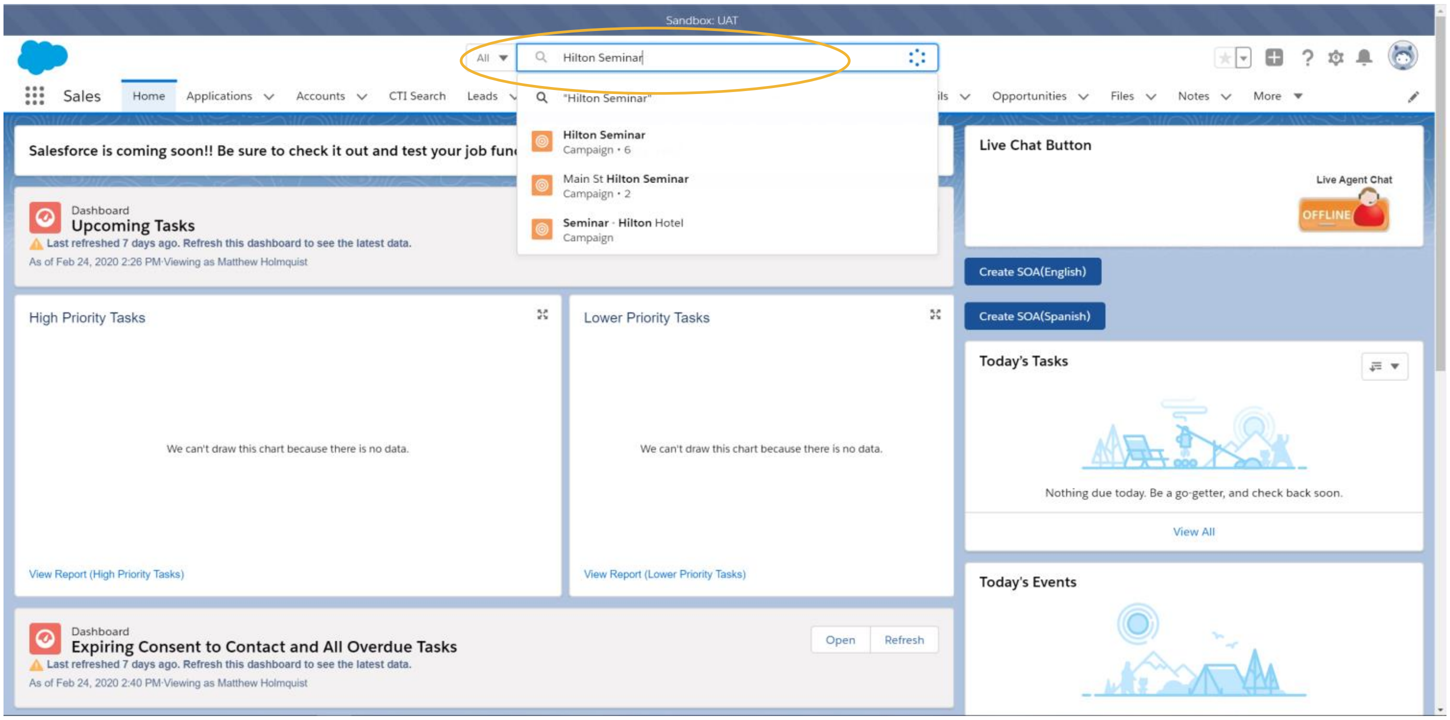
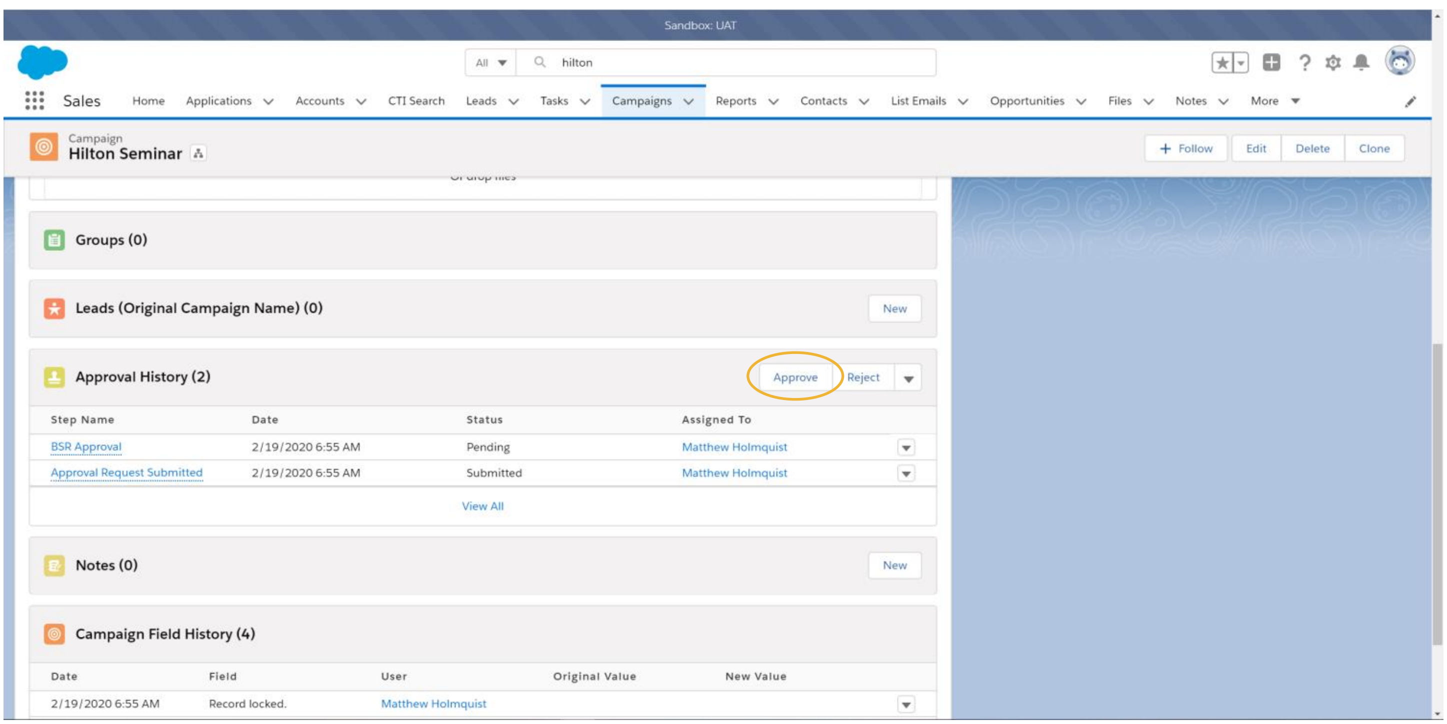
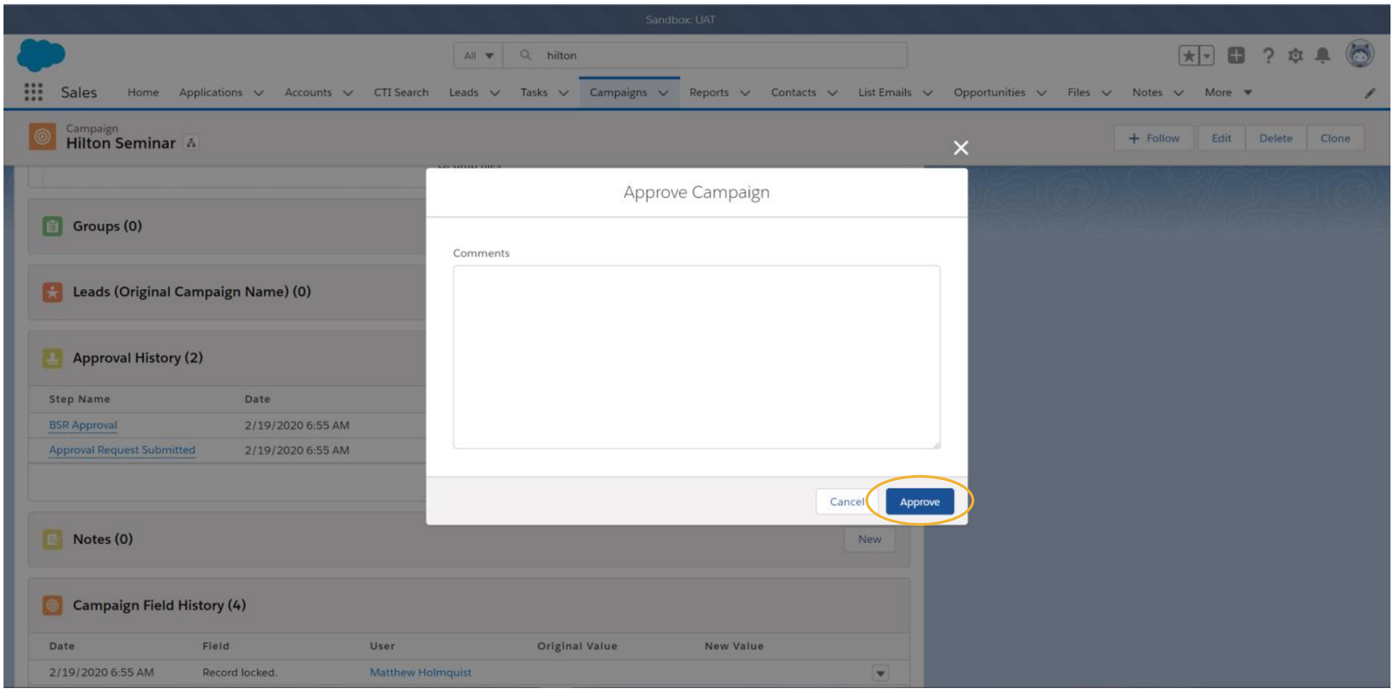
2. Search the Name of the Sales Event using the Global Search function or access the record through the Campaign Tab on the Navigation menu.



3. On the Related Tab Scroll down to the Approval History Component.
4. Click Approve to Approve the Sales Event.



5. Add notes if desired to the Approve Campaign form and click Approve.



Together, all the way.®

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