The Agent Recruiting System



Recruit, license, certify, contract and support Medicare agents on our own connected systems, all twelve months

Platinum Medicare · Kansas City, Missouri

One pipeline, nine connected stages

From first click on the hiring page to a producing agent, every stage hands the agent to the next one, and every step reports back to one place.



1 · RECRUIT
Recruit the agent



2 · ORGANIZE
Agent Portal



3 · LICENSE
State exam course



4 · PROVE IT
Exam Area & key



5 · TRACK
HQ Dashboard



6 · CERTIFY
AHIP prep



7 · CONTRACT
Carrier onboarding



8 · EDUCATE
MC101 community course



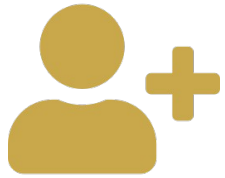
9 · YEAR-ROUND
The engine

Recruit: one person, one code, one record

STAGE 1 · RECRUIT

- A dedicated recruiting page at hiring.platinummedicare.com explains the opportunity and the path
- Signup issues a personal agent code (PM-XXXXXX); a returning applicant gets the same code back, never a duplicate
- The code is written onto the agent's CRM contact, so every system after this knows exactly who he is
- Onboarding walks the new agent straight into his portal

PM-XXXXXX	Blocked	Automatic
Code format	Duplicate codes	CRM link

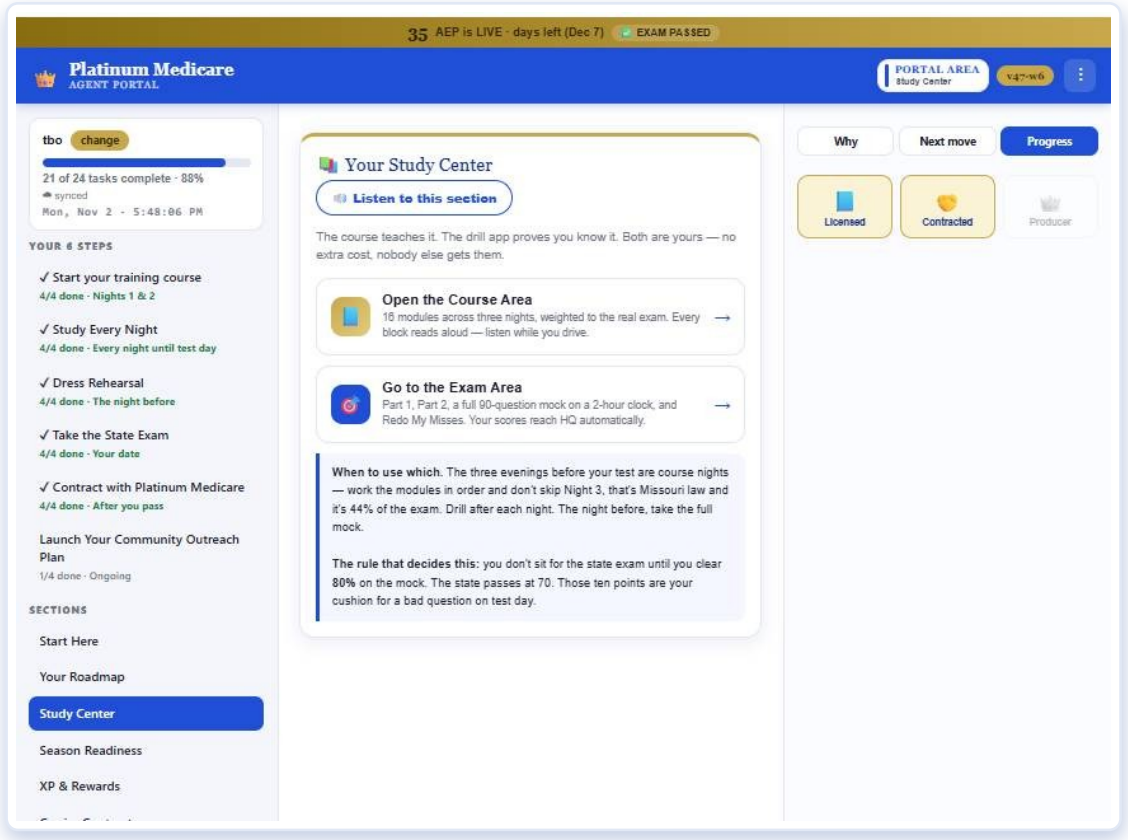


Applicant signs up → **Code issued and emailed** → **Code written to CRM** → **Agent enters the Portal**

Why it matters *Recruiting is a front door with a lock on it. Nothing downstream has to guess who an agent is.*

Agent Portal: a career turned into a checklist

STAGE 2 · ORGANIZE



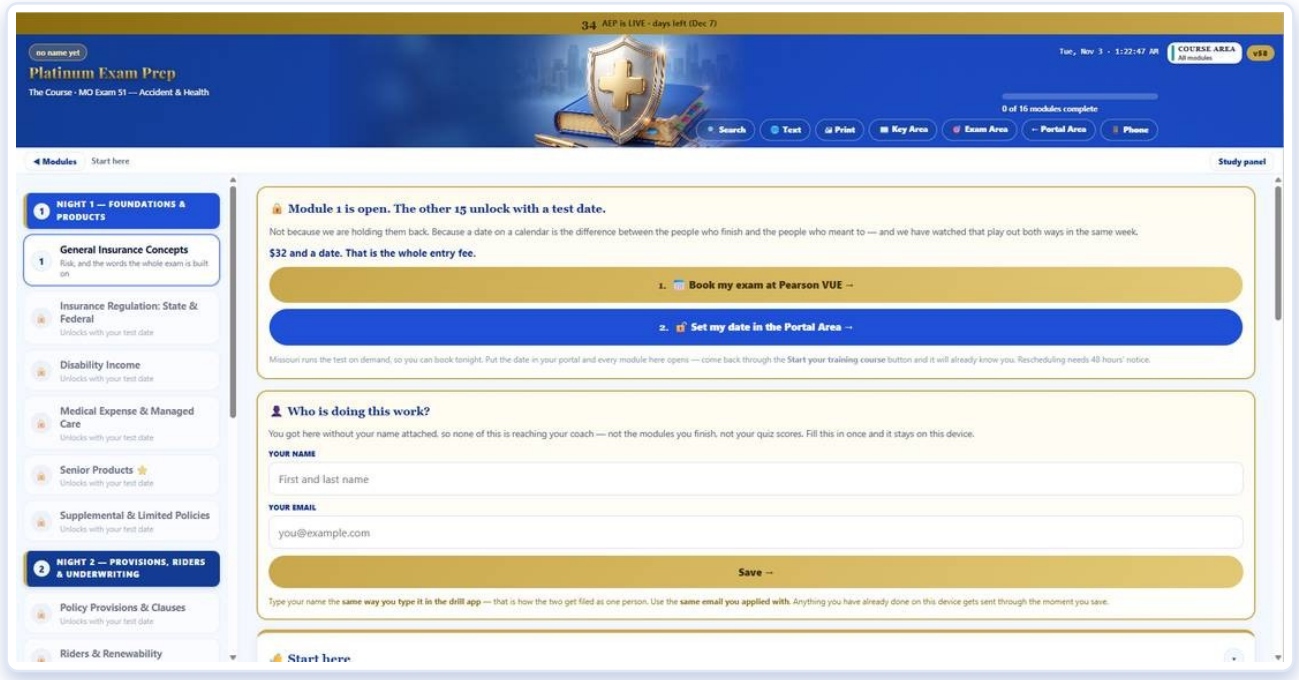
The live Agent Portal: six steps, the Study Center, and milestone trophies

- Six steps, twenty-four tasks: course, nightly study, dress rehearsal, state exam, contracting, community outreach
- Progress saves under the agent's name and follows him on any device
- Trophies mark each milestone: Licensed, Contracted, Producer
- Every save syncs to the CRM: exam date, test center, tasks done, readiness, last seen
- A built-in reader speaks every section aloud, so an agent can listen while he drives

6	24	5
Steps	Tasks	CRM fields

State exam course: built to the real test

STAGE 3 · LICENSE



The live Course: three nights, sixteen modules, a reader on every block

16
Modules

3
Evenings

44%
Missouri law

- Weighted to the exam blueprint: Missouri law is 44% of the exam, and the course weights it that way
- Module 1 is open to all; the other fifteen unlock when the agent books a test date
- Checkpoints and a quiz in every module, with the reason behind every answer

Why it matters *We do not hand a recruit a textbook and hope. The course is gated to a commitment and tracked to the module.*

Exam Area: our bar is higher than the state’s

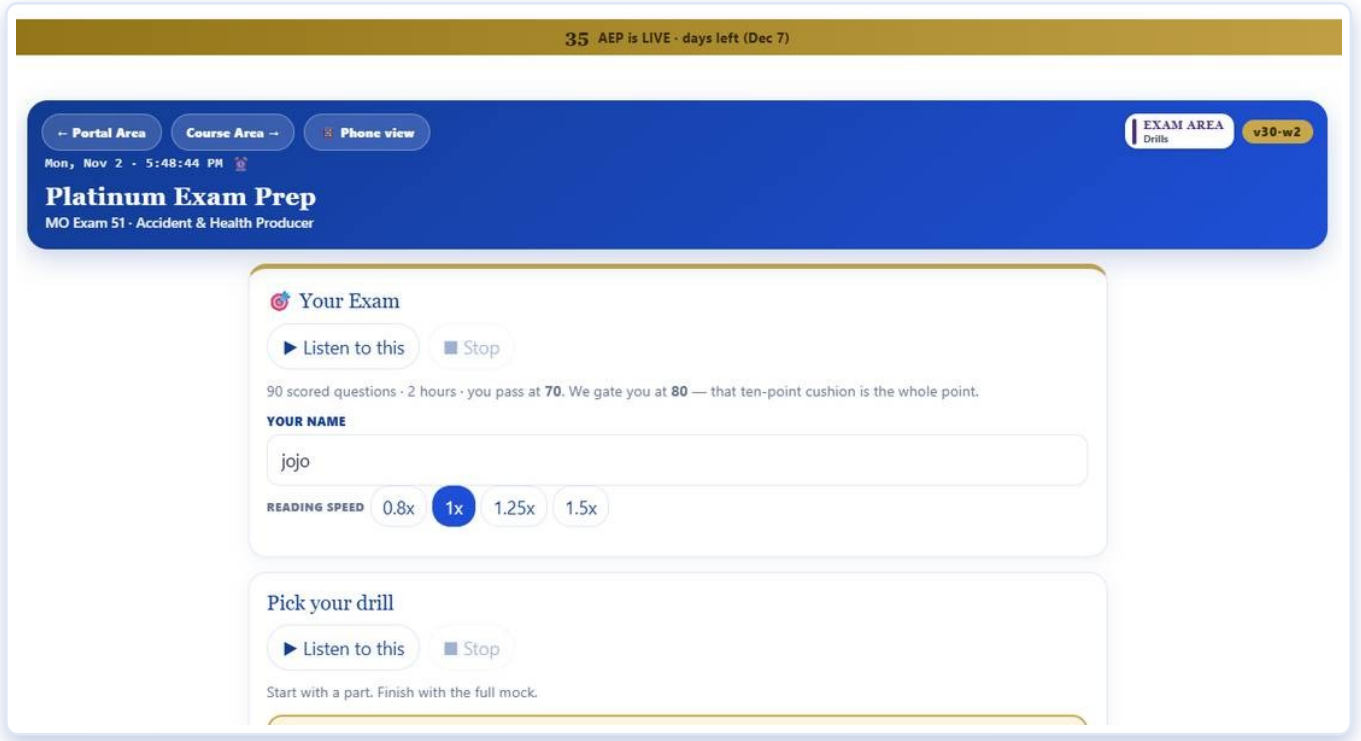
STAGE 4 · PROVE IT

80

our mock-exam bar before an agent sits

70

the state’s passing score



The live Exam Area: part drills and the full timed mock

Why it matters *A ten-point cushion: our agents have already passed the exam at a higher bar before they walk into the testing center.*

HQ Dashboard: leadership is follow-up

STAGE 5 · TRACK

Every surface counted
Last activity counts the course, the drills and the portal

Stall alerts
Agents quiet for 3+ days rise to the top of the list

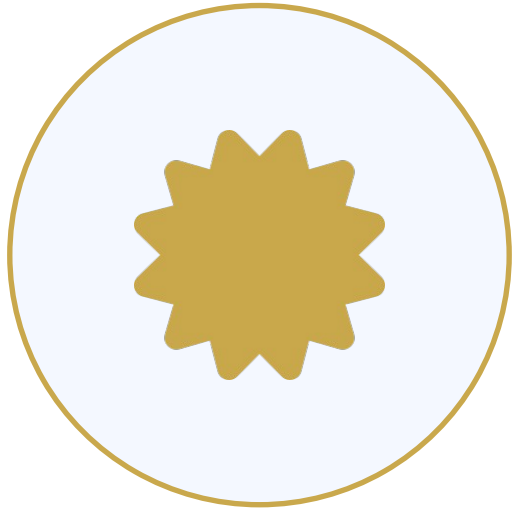
Notes on the record
Per-agent notes with tags, filterable

No retyping
Exam dates and readiness flow in from the portal

Agent studies or saves → Engine stamps the time → Dashboard updates → **Owner calls the stalled**

AHIP certification, inside the same system

STAGE 6 · CERTIFY



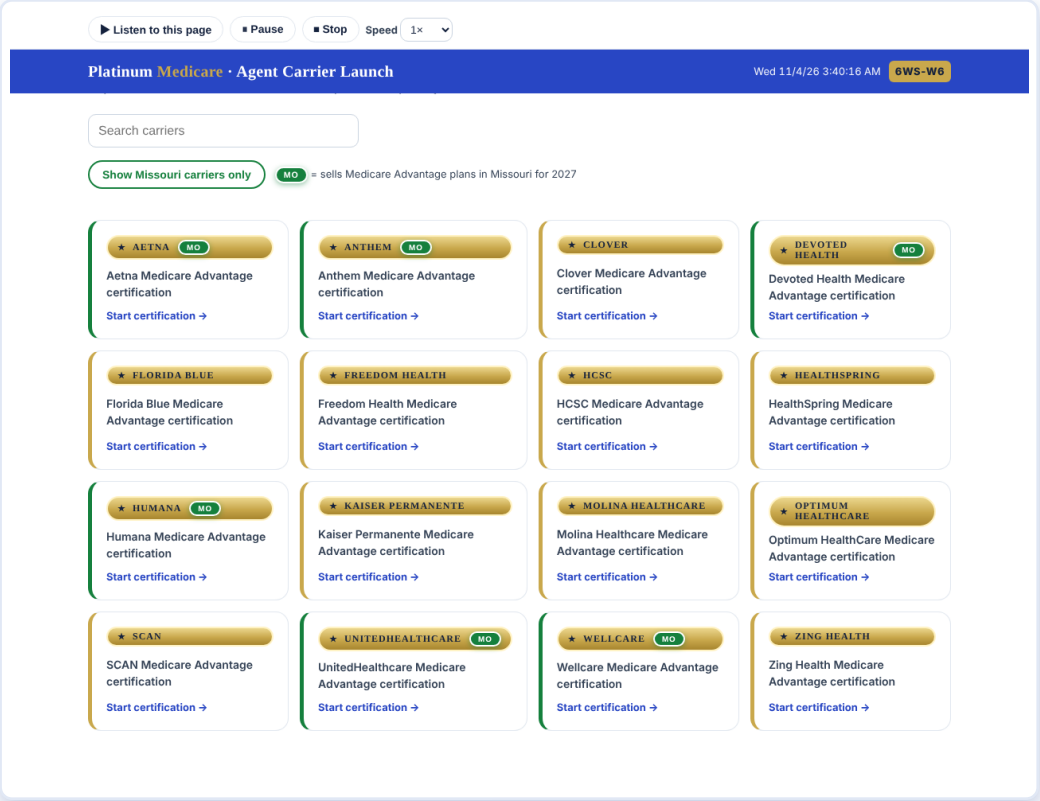
- A dedicated AHIP 2027 certification prep course at ahip.platinummedicare.com
- An admin console to watch every agent’s progress
- Results report into the same training engine as the state exam course

AHIP 2027	Yes	Training engine
Certification	Admin console	Reports to

Why it matters *Certification is where many agencies lose new agents for a season. Ours is prepared inside the same system that licensed him.*

Carrier onboarding: sixteen carriers, one tap each

STAGE 7 · CONTRACT



The live carrier page: gold badges, green MO for Missouri carriers

- Sixteen carriers on one page, each with its certification steps and a request form
- A green MO tag marks the carriers selling Medicare Advantage in Missouri for 2027
- Every request lands in our own database and CRM, tagged by carrier, with a confirmation for the agent
- The portal records NPN and resident state; Season Readiness stages track everything before AEP

16	6	Our CRM
Carriers	Missouri carriers	Requests to

MC101: we educate the community first

STAGE 8 · EDUCATE

Community partner shares the link → Resident takes MC101 → Resident meets an agent informed → Better, longer-lasting enrollments

Free to residents
Shared with apartment communities and senior homes

Education, not sales
Twelve plain lessons; no plan is sold on the page

Built for the CMS line
Stays on the education side of Medicare marketing rules

Why it matters *Educated clients are easier to serve and stay longer. Trust is built in the community before any appointment is set.*

The year-round engine

STAGE 9 · YEAR-ROUND

1

Off-season
Recruit and license

2

Pre-season
Certify and contract

3

AEP
Write business

4

Repeat
With a bigger team

- A live AEP countdown sits on top of every agent page
- Season Readiness stages prepare every agent before enrollment opens
- A Community Outreach Plan keeps agents working between seasons

Why it matters *Most agencies sell for eight weeks. This one builds all twelve months.*

What an upline partner gains

Agents who arrive ready
Licensed, AHIP-prepared and organized before contracting

Visibility on every agent
Activity, exam readiness and stalls tracked in one dashboard

A community already educated
MC101 builds trust before the first appointment

Our own systems
Pages and engines we built and run ourselves, all year

Production counts are shared separately, from verified records.

See it live

1. **Agency systems overview**
   systems.platinummedicare.com/
2. **Hiring page**
   hiring.platinummedicare.com/
3. **Agent Portal**
   portal.platinummedicare.com/
4. **State exam course**
   course.platinummedicare.com/
5. **Exam Area**
   exam.platinummedicare.com/drills
6. **AHIP prep**
   ahip.platinummedicare.com/
7. **Carrier onboarding**
   certs.platinummedicare.com/
8. **MC101 community course**
   mc101.platinummedicare.com/

A complete agency, ready to grow

Recruited, licensed, certified, contracted and supported on our own systems