



Worksite Case Management

Open more groups. Close more sales.

Introducing Worksite Case Management

The Worksite Case Management (WCM) team supports agents and distribution partners in our shared goal to open more groups and close more sales.

The WCM team assists in the presales process for new and existing groups. The team's goal is to tie together products, technology, new business and underwriting to enable successful group acquisitions and maximum participation.

The WCM team will:

- Respond to requests for proposals (RFPs).
- Consult with or assist agents in identifying employer's coverage gaps.
- Supply premium quoting and generation of proposals to develop the optimum benefits offering, which may include third-party products.
- Train new partners on Washington National's group set-up process, including WNezApp 2.0.SM
- Review marketing materials and tools for employer meetings and enrollments.
- Locate enrollment teams when a partner needs help enrolling a case.
- Coordinate with internal departments to meet special requirements or negotiate unique underwriting.
- Work with third-party relationships for sourced products to give agents one point of contact.



The WCM Team

Jenna Anderson, Connie Burgess, Carole Cokus and Alexis Myers.

CONTACT US

For more information, or to request help with any of the items outlined above, WCM can be reached at **(888) 266-6002** OPTION 4, or wcm@WashingtonNational.com.

Remember, you are not alone. WCM is here to help you acquire more groups and close more sales.

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