The Producer Playbook

Practice and Execution Workbook

Know What to Ask. Know What to Check. Know When to Get Help.

Brandon Davis

48 practical lessons and labs • Six fictional cases • Worked examples
Conversation tools, coaching rubrics and reusable practice worksheets

VISUAL REVIEW EDITION / OCTOBER 2026

A look inside the workbook

Build a repeatable practice, one clear question and one verified step at a time.

03 **A fictional client case**

Turn Morgan’s provider and travel priorities into an evidence plan.

04 **A reusable practice page**

Write the checks, response and unresolved item before deciding.

05 **A worked funnel**

Read the counts and denominators before drawing a conclusion.

06 **A coaching tool**

Observe one behavior, rehearse a better alternative and review it.

07 **Source and rule notes**

Keep current official sources and effective dates visible.

The complete paid workbook

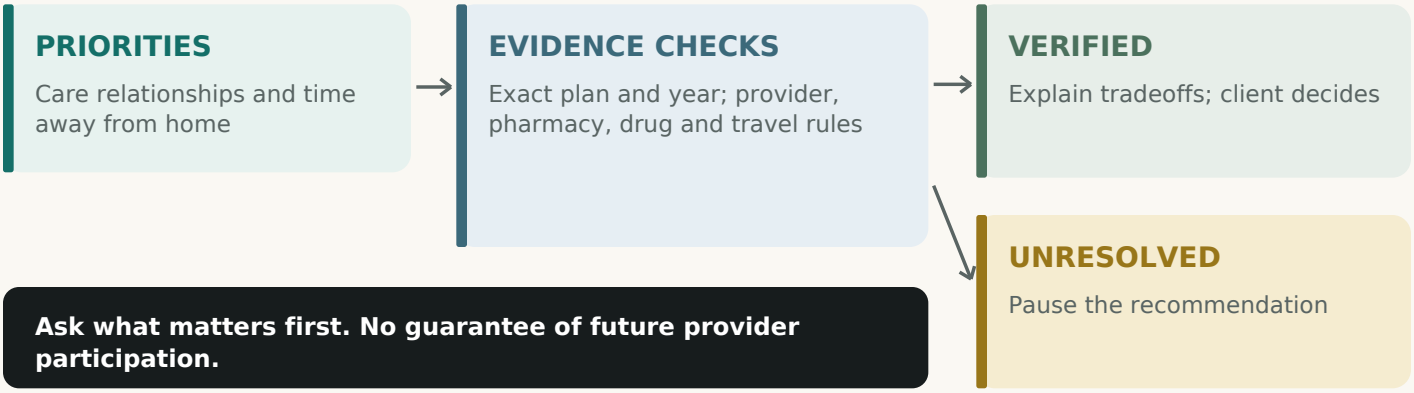
48 practical lessons and labs, six fictional scenarios, conversation practice, two coaching rubrics, thirty and ninety day plans, and reusable worksheets. The digital edition adds fillable exercises and clickable navigation.

This is a limited educational review sample. All cases and numbers are fictional. Keep private client information out. Author, rights and professional compliance review are required before public release.

05 FICTIONAL SCENARIO LABS

Scenario 1 Protecting Provider and Travel Priorities

What would I ask, check, or clarify before taking the next step?



01 Fictional practice case: Morgan requests a review after seeing an advertisement. Keeping Provider A and Pharmacy B matters more than an extra benefit. Morgan spends several months away from home and uses fictional medication placeholders Drug A, Drug B, and Drug C. Use invented information only.

02 Imagine a practice packet containing an old provider-directory screenshot, an undated benefit summary, and a current-looking advertisement. None establishes that a particular plan fits Morgan. The producer must confirm the relevant plan year, service area, exact plan, provider participation, pharmacy arrangements, drug coverage and restrictions, and applicable travel provisions using current approved sources. A provider saying it accepts Medicare does not settle participation in a particular plan.

03 Safe opening: 'You have named two priorities: keeping your care relationships and understanding coverage while traveling. Before comparing options, I need to verify those details for each exact plan. If I cannot confirm something important, we will leave it unresolved rather than assume.' Confirm that the discussion remains within the previously established Scope of Appointment and applicable appointment requirements.

04 Morgan asks, 'Can you promise my doctors will stay covered?' Respond without guaranteeing future participation. Explain what can be verified now, identify remaining uncertainty, and let Morgan decide whether to continue.

Put this into practice on the next page

05 FICTIONAL SCENARIO LABS

Scenario 1 Protecting Provider and Travel Priorities

Practice lab | What would I ask, check, or clarify before taking the next step?

Practice Build a verification plan before naming a preferred option.

Which five facts must be verified, and through which current sources?

Write your response to the request for a guarantee.

Record the unresolved item that would stop your recommendation.

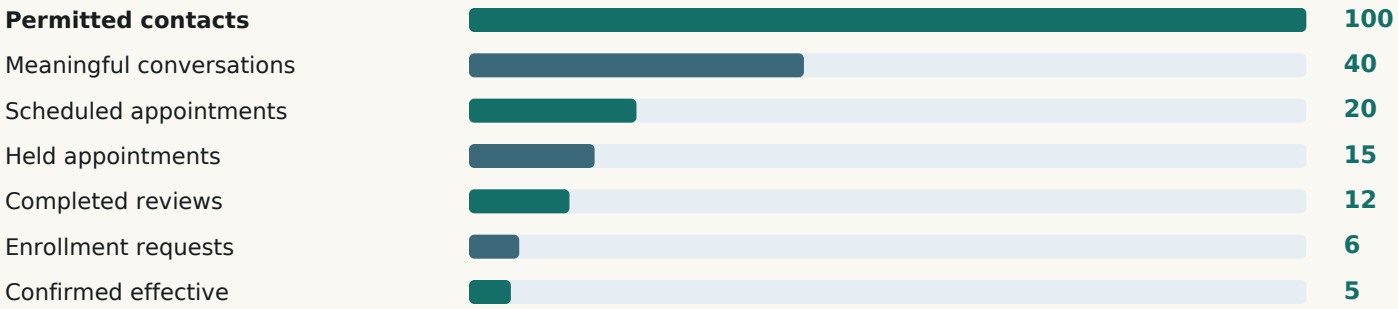
☐ Practiced ☐ Reviewed with evidence ☐ Needs another attempt

08 MEASURE AND IMPROVE

Worked funnel math

Can I show the denominator behind every rate?

FICTIONAL COHORT / COUNTS BEFORE RATES



01 Consider a fictional cohort of 100 permitted contacts. Forty result in meaningful conversations. Twenty appointments are scheduled, fifteen are held, twelve reviews are completed, six enrollment requests are submitted when appropriate, and five are later confirmed effective. These numbers illustrate arithmetic only; they are not benchmarks, expected results, or income projections.

02 Conversation rate is 40 divided by 100, or 40 percent. Scheduling rate from conversations is 20 divided by 40, or 50 percent. Held rate is 15 divided by 20, or 75 percent. Review completion rate is 12 divided by 15, or 80 percent. Request rate from completed reviews is 6 divided by 12, or 50 percent. Confirmed-effective rate from submitted requests is 5 divided by 6, about 83.3 percent.

03 The end-to-end rate is 5 divided by 100, or 5 percent. Multiplying the unrounded stage fractions produces the same result. Multiplying rounded percentages may produce a slightly different result. Keep raw counts so you can reconcile the calculation.

04 Now interpret cautiously. Three held appointments did not become completed reviews. Were facts missing, was scope inappropriate, or did people choose to stop? Each explanation leads to a different response. Do not assume the answer is a stronger closing script. Find the reason before choosing an intervention.

The complete workbook includes a matching practice exercise.

08 MEASURE AND IMPROVE

Coach the behavior you can observe

Which behavior can we improve next?

1 Observe
Quote the actual behavior

→

2 Demonstrate
Show one better alternative

↓

3 Rehearse
Repeat the exact segment

←

4 Review
Use the same scoring anchor

01 A useful coaching review begins with evidence. Ask the producer to name the goal, show the relevant record or approved practice recording, and identify the moment they want help with. Discuss one behavior at a time. “Be more confident” is less useful than “Pause after the question so the person can finish answering.”

02 Use a simple sequence: describe the observed behavior, explain its effect, demonstrate an alternative, practice it, and agree on the next observation. Keep feedback about conduct rather than character. A person can correct an interrupted explanation more easily than a label such as “not a natural salesperson.”

03 Start with self-assessment, but do not substitute it for observation. The producer may feel an appointment went well while the record shows an essential question remained unresolved. Conversely, a conversation that did not lead to enrollment may show excellent listening and sound judgment. The observer should distinguish process quality from the outcome.

04 End with a narrow commitment. “In the next three practices, I will summarize the priorities before comparing options” is testable. “I will do better next week” is not. Schedule a review that uses the same scoring anchors. Preserve a brief record of what improved and what still needs practice.

The complete workbook includes a matching practice exercise.

11 SOURCES AND NEXT STEPS

Sources and current rule notes

References checked October 8 2026. Bracketed numbers in the lessons refer to the sources below. They support the specific regulatory notes; the practice exercises, planning methods, and fictional examples are original teaching material.

[1] Centers for Medicare and Medicaid Services. 2027 Agent and Broker Training and Testing Guidelines. See pages 1, 3, 5-7 for training, recording, appointment scope, and pre-enrollment discussion topics.

https://www.cms.gov/files/document/cy2027-agent-broker-training-testing-guidelines-pdf.pdf

[2] Centers for Medicare and Medicaid Services. Contract Year 2027 and Certain Contract Year 2026 Policy and Technical Changes, final rule, April 6 2026, Federal Register 91 FR 17384. The marketing and communications changes apply to CY2027 marketing beginning October 1 2026. See the personal marketing appointment and SOA discussion.

https://www.govinfo.gov/content/pkg/FR-2026-04-06/html/2026-06600.htm

[3] Medicare.gov. Marketing rules for health plans. Consumer-facing explanation of sales conduct and appointment protections. Read alongside the newer final rule and current carrier guidance; a general webpage may not describe every effective-date nuance.

https://www.medicare.gov/health-drug-plans/health-plans/your-coverage-options/plan-marketing-rules

Important distinction: removing a waiting period did not remove the need for agreed scope or authorize unsolicited outreach. A plan’s current materials, approved workflow, state requirements, and the facts of an individual case may impose additional obligations. Ask the responsible compliance resource when the correct path is uncertain.