

The Q4 Fast Start

You don't have time to learn a new system in the middle of renewal season. So don't. Send us your next renewals, and we'll build them in Plansight for you. Current and renewal side by side, client presentation done, marketing file ready to go. **You make the decisions. We do the setup.**

WINDOW

Q4 2026 only

VOLUME

Up to 10 groups

BEST FIT

Small group & community rated

PRICING

Standard. Time back, not a discount.

HOW IT WORKS

01

We provision your account.

Your agency is live in Plansight before you lift a finger.

02

You send the renewal.

One email per group. No working session required.

03

We build it.

Current and renewal loaded, client presentation assembled, marketing file pre-built.

04

We send it back ready.

You review it and decide: bind it, shop alternate plans, or send it to market with a couple of clicks.

WHAT WE NEED FROM YOU

Your existing client presentation, the one you already built for that group. That's the fastest path.

Or the current plan documents and the renewal documents.

Community-rated groups: current plans and the enrollment. We already have the renewal rates.

That's the whole list. Clean inputs are what make this fast. A folder of everything you have on the group slows it down for both of us.

WHAT YOU GET OUT OF Q4

Renewals out the door during your worst-timed quarter.

Your book loaded and organized in Plansight, so January starts from a running system instead of a blank one.

A real look at the workflow. Community-rated, large-group, level-funded, self-funded, and ancillary.

WHAT IT DOESN'T CHANGE

Your carrier relationships.

Plansight is not a General Agency. We don't request or negotiate quotes on your behalf. That's your relationship, and it stays that way.

Your sign-off.

We check our work before it comes back, but you own the final review of every presentation that reaches your client.

Your training.

This is a lift, not a substitute. Live sessions with a Plansight consultant are still the fastest way to learn the application.

Why we're willing to do this

Because once you see how fast the system moves, you won't want to email us. Emailing a group to us and waiting on a reply takes longer than doing it yourself in Plansight. This offer exists to prove that during the one quarter you can't afford to find out the slow way.



CLAIM A SPOT

Book time with us.

Scan, visit, or click here --> plansight.net/fast-start