# New Client Business

[ New Client Business Referral](#_Toc158209611)

[Related Documents](#_Toc158209612)

 **Description:** Process when a broker or consultant contacts our Plan Benefit Package (PBP) regarding new business that will be sent to our sales department.

[Top of the Document](#_top)

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| New Client Business Referral |

Perform the steps below for a new client business referral:

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| **Step** | **Action** |
| **1** | * Advise the caller to send an email to the following email address: [rfp.proposals@cvshealth.com](mailto:rfp.proposals@cvshealth.com). * Advise that they must include the following information: * Consultant/Broker Name * Consultant/Broker Phone Number * Client Name * Client Headquarters City, State * Client Group size (# of lives) * Upcoming Proposal Opportunity(ies) * RFP Due Date (if applicable) * RFP Documents (if applicable) |

[Top of the Document](#_top)

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| Related Documents |

**Abbreviations/Definitions:** [Customer Care Abbreviations, Definitions and Terms](file:///C:\Users\DDavis6\Desktop\Subcommittee%20Review\Ready%20for%20Posting\CMS-2-017428)

**Parent Document:** [CALL 0049 Customer Care Internal and External Call Handling](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0049" \t "_blank)

[Top of the Document](#_top)

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