

2020 AEP AGENT CHECKLIST

SET GOALS

- Have you researched carriers in your market to see if they've expanded their availability?
- Are you contracted to sell multiple carriers?
- Are there new products that you didn't sell last year that you could be selling this year?
- Have you set goals for AEP?

BECOME READY TO SELL

- Have you contracted with all the carriers you want to sell this year?
- Have you completed all relevant training for each carrier and completed your certifications?
- If you sell Medicare Advantage, have you completed your AHIP?

KNOW YOUR PRODUCTS

- Have you attended any benefit sneak peeks for your area?
- Do you know how to use each carrier portal and how to submit applications?

ORDER SUPPLIES

- Does enrollment kit contain everything you need? Do you need to order anything separately?
- Will any enrollment kits be sent automatically after you complete your certification? If so, how many?
- How long will it take for you to receive your order?

MARKET YOURSELF

- Direct Mail
- Events
- Social Media
- Partnering with Providers