

2021 AEP CHECKLIST

LET'S GET PREPARED.

AEP (the Medicare Annual Enrollment Period) only lasts from **October 15 through December 7**. Anyone enrolled in Medicare can make use of the AEP, but you only have seven weeks to close all of those sales.

Make sure that you can make full use of those seven weeks by getting completely prepared.



AHIP

Have you completed your AHIP training?



SUPPLIES

Have you ordered your supplies?



CARRIERS

Have you contracted with all of your carriers?



MARKET

Are you familiar with changes in your market?



PRODUCTS

Have you completed your product training?



COMPLIANCE

Are you familiar with compliance changes?

WHAT CAN CLIENTS DO DURING AEP?

- ✓ Enroll in Medicare Advantage for the first time.
- ✓ Switch from one Medicare Advantage plan to another.
- ✓ Join a Medicare prescription drug plan.
- ✓ Switch from one prescription drug plan to another.
- ✓ Drop prescription drug coverage completely.



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MEDICARE SALES TIMELINE



It's important to understand when all of the yearly changes are made to understand when you need to be preparing for AEP.



JANUARY - MAY

Carriers begin working on and submitting new plans to CMS for approval for the following plan year.



JUNE - JULY

Certifications for the following plan year become available.



AUGUST

Benefit "sneak peeks" begin (sometimes sooner) even if they are still pending CMS final approval.



OCTOBER 1

Final plan details are released to the public and marketing can legally begin.



OCTOBER 15 - DECEMBER 7

Annual Enrollment Period begins. Clients may make changes to medical or prescription drug coverage.



JANUARY 1

Plans sold during AEP become effective



JANUARY 1 - MARCH 31

Open Enrollment Period begins, your clients will have the opportunity to switch from the plan you enrolled them in to a new option. You cannot market to them during this time.



SEP

Clients may have the chance to sign up for Medicare Part A or Part B, any private Medicare plan, and/or switch plans during an SEP if they are eligible.



IEP

For those aging in, IEP begins 3 months before a client's 65th birthday and ends 3 months after.



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PREPARING FOR AEP SALES

START WITH YOUR BOOK OF BUSINESS.

Once you've done all that, it's time to start reaching out to your existing book of clients. It's best to start with the people who already remember your name. You may be able to book yourself up before you know it!

You can even offer incentives to your existing book by calling and saying things like, "I'd love for you to be one of my first appointments this year so we can make sure you're still happy with your coverage." Make your existing clients feel like they come first, and they'll keep coming back! Plus, you'll lower your risk of losing your clients to other agents in your area who acted quicker than you did.

FIND NEW CLIENTS FOR AEP.

Then, it might be time to find some new prospects to fill your schedule with.



**VISITING LOCAL SENIOR
CENTERS AND GROUPS**



**PARTNERING WITH DOCTORS
& HOSPITAL SYSTEMS**



**HOSTING CMS-COMPLIANT
MARKETING EVENTS**



POSTING SOCIAL MEDIA ADS

Did you know?

You cannot advertise Annual Enrollment Period before October 1. This includes using the terminology Annual Enrollment Period & AEP.



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THINGS TO CONSIDER...



Drip Campaigns/Triggered Emails

The best way to let your potential leads and clients know AEP is approaching is through drip campaigns and/or triggered emails. These allow you to have emails sent automatically and all you have to do is create the content beforehand! By utilizing these tools you can focus on more important tasks and better prioritize your time. MailChimp is a great tool for this. They have a free basic package that allows you to personalize and schedule every email!



Gather Information

Medicare coverage can be a confusing topic for many beneficiaries. By preparing handouts, checklists (like the one in this packet), and guides ahead of time, you will be better prepared to provide this crucial information to prospects. This is especially important for new Medicare-eligible beneficiaries who have not discussed plans, coverage, caps, or plans before. Additionally, it's crucial to complete your certifications and order your enrollment kits from carriers - and the sooner the better!



Create Business Cards

Business cards are extremely important when interacting with potential clients. Even though the world is heavily centered around technology, seniors will appreciate having a physical copy of your information. Be sure to update your information and keep them on you at all times. There are numerous online sites, like VistaPrint or Moo, that help you create beautiful business cards that beneficiaries will love!



Prepare, Prepare, Prepare!

How prepared are you for this AEP? Is your technology going to be able to keep up? Be sure to update all of your devices and be prepared for any technological setbacks. This three-month period will fly by and you do not want to waste time with technology not working as efficiently as possible. **WARNING:** You cannot advertise Annual Enrollment Period before October 1, 2018. This includes using the terminology Annual Enrollment Period and AEP.



SETTING GOALS FOR AEP

HAVE YOU SET ANY S.M.A.R.T. GOALS?

S.M.A.R.T. stands for specific, measurable, attainable, relevant, and timely. Writing down your goals and turning them into S.M.A.R.T. goals can turn your entire AEP strategy around. Your goals should stretch you but be reasonable. They should include concrete numbers that you can write down and easily keep track of.

Consider setting a goal for the amount of appointments you want to attend during AEP and for the amount of policies you want to sell. If you've done this before, you can even use math from your past years to calculate how many appointments you would need to attend to meet your sales goals.

For example, if your close rate is about 20% (you sell policies on about 20% of your appointments), and you want to sell at least 20 policies during AEP, then you should set at least 100 appointments.

Then, it might be time to find some new prospects to fill your schedule with.



SPECIFIC



MEASURABLE



ATTAINABLE



RELEVANT

Did you know?

3% of adults have specific, measurable, time-bound goals and they achieve 10 times as much as people without goals.



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LET'S CHECK IT OFF.

Creating a checklist requires you to break down all major tasks into smaller and more specific tasks. Use this checklist to get started!

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? Does anything separately?
- ☐ Will any enrollment kits be sent automatically after you complete your certifications? If so,
- ☐ how many?
- ☐ How long will it take for you to receive your order?

MARKET YOURSELF

- | | |
|--|--|
| <input type="checkbox"/> Direct Mail | <input type="checkbox"/> Business Cards |
| <input type="checkbox"/> Events | <input type="checkbox"/> Email Marketing |
| <input type="checkbox"/> Social Media | |
| <input type="checkbox"/> Partnering with Providers | |

BENEFICIARY READINESS CHECKLIST



KNOW THEIR BUDGET



RESEARCH COVERAGE OPTIONS



LIST CURRENT PRESCRIPTIONS



LIST PREFERRED PHARMACIES AND DOCTORS



GATHER PERSONAL INFORMATION

- ☐ Dependent Information
- ☐ Mailing Address
- ☐ Social Security Number
- ☐ Immigration Documentation (if applicable)
- ☐ Tax Filing Information
- ☐ Employer Information
- ☐ Current Health Coverage Information





Good Luck!

SUMMARY

As October 15th creeps up on us, remember to complete your contracting and certifications, order your supplies, read up on market changes and complete your product training, set your goals, and get going! There's no time to waste. Happy AEP!

SENIOR MARKET
ADVISORS



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