

## Start Preparations for AEP

### Pre-AEP Checklist

Do it all NOW

- Know your carriers
- Know your plans
- Know your prospects
- Execute your plan of attack (Business Plan)
- Build your prospect list
  - Get Black Book Filled Out
    - Give out your business card
  - Make Two Lists of Prospects
    - Permission to “CALL” on October 1<sup>st</sup> List: CMS approved
    - Permission to “MAIL” on October 1<sup>st</sup> List: CMS approved
- Complete Certifications
  - Certify Early
  - Some carriers certifications will be more simple each year
  - Complete any training classes needed
  - Call or come by Compass Group Insurance’s office for help with certifications
- Pre-order Kits for AEP
  - Learn how to order on your own (Ask Compass for our Guide on Supply Ordering)
  - Pre-order before October 1<sup>st</sup>
- Good Service and Retention
  - Contact with clients at least 3 times a year
  - Ask for references
  - Contact your referral list per mail or call

### What NOT to do during AEP

- Do not plan anything that is considered “time stealing”
  - Vacations
    - Seeing family trips
    - Family pleasure trips
  - Repairs
    - Home Improvements
    - Auto repairs
  - Chores
    - Major errands
    - Large projects
  - Professional Items
    - Continuing education requirements
    - New agent certifications
    - Website/Portal Training

**Compass Group Insurance**

11 South 11<sup>th</sup> Street

Fernandina Beach, FL 32034

(904) 746-4648 Phone

(866) 626-5450 Fax