

Season of Preparation

Now is the time to get ready 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 1st List: CMS approved
 - Permission to “MAIL” on October 1st 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 1st
- 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