MY PLANS | REMINDERS | REVIEWS

# AGENT PLANNER 2022



NCC National Contracting Center

# MONTHLY CALENDAR

## April

| SUNDAY | MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY | SATURDAY |
|---|---|---|---|---|---|---|
| | | | | | 1 | 2 |
| 3 | 4 Join a chamber of commerce in your main marketing area | 5 | 6 | 7 | 8 | 9 |
| 10 | 11 Identify large companies and meet the HR person | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 Volunteer or join up with businesses who associate with the senior market | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |

## REMINDERS

- Start working your leads. Most of the business you write now through September will be T-65, low income, and 5-star business (if one is located in your marketing area.) If you start marketing early in the year, you'll have plenty of leads to work over the slow half of the year. Cash can get a little tight later in the summer, so make sure you are taking advantage of Low-No-Cost marketing like referrals and professional relationships.
- Be aware of the month and try to not to contact financial planners and CPAs as they are in the final weeks of tax season for their clients.

# MONTHLY TRACKER

MONTH : **April**

## Action Steps

- Join a chamber of commerce in your main marketing area. You can use their membership to look for potential sales. If you are in a rural market you may have to join several.
- Use this directory to identify large companies. Once found, go and meet the HR person to present the value of getting their T-65 and older off of their current health plan.
- Locate businesses who associate with the senior market and see if you can volunteer or join up for services or support their stores.

## TASK LIST

## REVIEW

- Go over 1st Qtr. Production. Are you on track for your goals? Continue actionables from 1st Qtr.
- Watch Lead Generation webinar.

Lead Generation

- Read Top 5 DVH Plans.

Top 5 DVH Plans

## NOTES