MY PLANS | REMINDERS | REVIEWS

AGENT PLANNER 2022



NCC National Contracting Center

MONTHLY CALENDAR

August

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1	2 Start licensing certification and right to sell	3	4	5	6
7	8 Identify and approach senior living. Make contact, set table event	9	10	11	12	13
14	15	16	17	18	19	20
21	22 Verify that BRCs are being shipped	23	24	25	26	27
28	29	30	31			

REMINDERS

- Verify that your BRCs are being shipped. You want your leads to have mailers going out into AEP. There is a 3-4 week turnaround, so expect to see BRC coming in around mid to late September.
- Decide on which carriers to sell in your marketing area and start on your licensing certification and right to sell certificates. Make sure you keep a detailed log on this as an error on your part can lose thousands of dollars in commissions. Carriers will not notify you of this during AEP and you may write some business and not get paid.

MONTHLY TRACKER

MONTH : August

Action Steps

- [x] Identify and approach some senior living or low income living for seniors. Offer to volunteer on a regular basis. Create something like a happy hour for the seniors so you can interact with them plus they really love the time. Once established you can ask the housing manager to do some educational meetings and invite the manager as they can be protective of their people. Leave business cards at the happy hours and a creative flyer to leave in their meeting room.

TASK LIST

REVIEW

- With your carriers decided for AEP, review your contact information for each company. Develop a contact sheet for each broker manager.
- Set up some time for introductions and have them go through selling points for each of their products.
- Review each products against each other to find out which product will be best for certain situations such as DSNP or diabetic programs.

NOTES