MY PLANS | REMINDERS | REVIEWS

AGENT PLANNER 2022



NCC National Contracting Center

MONTHLY CALENDAR

December

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				1	2	3
4	5 Beneficiaries contacted & completed by 7th	6	7 AEP Ends!!	8	9	10
11	12 Order leads for Jan & Feb before 15th	13	14	15 Order business cards	16	17
18	19 Contact your associates to thank them for partnership	20	21	22	23	24
25	26 Review lead generation plan for next year	27	28	29	30	31

REMINDERS

AEP ENDS 12/7!!!

- Order leads for January and February by the 15th so they go out right after Christmas.
- If you didn't sell ancillaries during AEP, reach out to current clients and offer them now.
- Make a lead generation plan for the coming year. See our guide to lead generation for more ideas. GUIDE to LEAD GENERATION

MONTHLY TRACKER

MONTH : **December**

Action Steps

- Make sure all beneficiaries have been contacted and completed by December 7th so there are no surprises come January 1st.
- Contact your associates (financial planners, CPAs, human resources) and thank them for their partnership. Personal visits are the best.
- Review your annual plan and measure your successes and what you need to change for the following year.
- Make sure you order more business cards to have ready to hand out in the winter.
- Relax for the holiday season and the start of a better year.

TASK LIST

REVIEW

- Make sure you have your following year plan completed and realistic.
- Review your B.O.B. and evaluate your success. Make sure it is accurate and complete.
- Watch NCC's Book of Business to get new ideas for next year.

BOOK of BUSINESS

NOTES