MY PLANS | REMINDERS | REVIEWS

AGENT PLANNER 2022



NCC National Contracting Center

MONTHLY CALENDAR

January

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
						1
2	3 Call 10 clients per day until B.O.B. complete	4	5	6	7	8
9	10 Contact two financial planners for referrals	11	12	13	14	15
16	17 Contact a local CPA for referral	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

REMINDERS

- During OEP, you can't advertise OEP, but you can do your normal T65 or Low-Income marketing. You can also make clients aware of OEP during a presentation.
- Start marketing to T-65 list and low income prospects early. You will be glad that you did over the summer.
- Get in touch with your current clients and offer ancillary products and always ask for referrals.
- Some markets now have 5 star plans to sell at any time during the year.

MONTHLY TRACKER

MONTH : January

Action Steps

- Call 10 customers per day to check-up on current plan and ask for referrals. Continue calling your clients until you have completed your B.O.B.

  Contact Log

- Contact two financial planners to discuss referrals.

  Financial Planner Log

- Contact a local CPA to discuss referrals.

  CPA Log

TASK LIST

REVIEW

- Review your B.O.B.- Make sure all customers are in CRM and identify products sold. Take the review you did in December and apply it to your own to find more ways to increase sales.

- Review D-SNP plans as you can sell in non-AEP months. For more details on how to approach beneficiaries and how to sell these plans, contact NCC's presentation

  D-SNP Guide

- Take advantage of any 5-star plans in your market and review other opportunities to Locate potential beneficiaries.

NOTES