MY PLANS | REMINDERS | REVIEWS

AGENT PLANNER 2022



NCC National Contracting Center

MONTHLY CALENDAR

July

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1	2
3	4 Visit local businesses to leave cards & set up table events	5	6	7	8	9
10	11	12	13	14	15	16
17	18 Research market for veteran opportunities. Contact local VSOs for support	19	20	21	22	23
24	25 Order BRCs	26	27	28	29	30
31						

REMINDERS

- **FIRST LOOKS.** The products have been submitted to CMS, but haven't been approved yet. They'll give you a general idea of what to expect in the counties where you sell and help you decide where to mail your BRCs for AEP.
- **BRCs.** Order as soon as possible to be guaranteed addresses in your geographic target. Most lead companies won't double mail in the same area for different agents. Order your BRCs at the end of July and plan to mail in mid-August.
- Research your markets for veteran opportunities. Contact local VSOs and your carriers for support.

MONTHLY TRACKER

MONTH : July

Action Steps

- Go around to area businesses which may be visited by older or low income people ask the manager to see if you can leave some cards or a flyer that we can help create for you. Contact your Sales Support Specialist to discuss creation of marketing materials.

- If you have success with any of these businesses, ask to see if you can set up a table with general Medicare information. Make sure you have PTC forms when you go. Businesses such as laundromats, Dollar General, or Fashion Hardware stores have clientele that seem to be older.

TASK LIST

REVIEW

- Before you go out to these businesses, make sure you review our digital department and ask them to help you develop low to no-cost advertising pieces. Contact your Sales Support Specialist to discuss creation of marketing materials.

- Review carrier products that are available for veterans. Humana, UHC seem to be the most competitive.

- Review all of the carrier's first looks and determine which ones are the best for your market

NOTES