MY PLANS | REMINDERS | REVIEWS

AGENT PLANNER 2022



NCC National Contracting Center

MONTHLY CALENDAR

June

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2	3	4
5	6 Create a log for doing your AHIP and company certifications	7	8	9	10	11
12	13 Be active within your community (chamber / volunteer)	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

REMINDERS

- You must take the AHIP test and pass in order to sell Medicare. It is important that you take it every year in order to get renewal commissions as well as new. This is required if you want to sell Medicare Advantage and PDPs. See the CONTRACTING SECTION on the NCC site for more details.
- Continue working the social side to meet as many people as you can.
- Start researching carriers in your market.

MONTHLY TRACKER

MONTH : June

Action Steps

- Create a log for doing your AHIP and company certifications. Make sure that you have a "Ready to Sell" confirmation from each. This mistake may cost thousands of dollars in commissions as carriers will not contact you during AEP.

- Join your local chamber of commerce and attend networking events. Volunteer educational meetings for seniors. Be active with them so you can hand out cards or flyers. Go out to new business open houses

TASK LIST

REVIEW

- Review rules and regulations for Medicare as AHIP starts this month. Make sure you are comfortable with all aspects of Medicare and if you have questions, reach out to NCC.

- Sort Book of Business by carrier to aide in contacting customers regarding plan changes.

- Before month's end, evaluate 2nd Qtr. activity and make sure you're on track to hit your goals.

NOTES