MY PLANS | REMINDERS | REVIEWS

AGENT PLANNER 2022



NCC National Contracting Center

MONTHLY CALENDAR

March

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1 Continue the same actionables from January and February.	2	3	4	5
6	7 Join a B2B as a Medicare Consultant	8	9	10	11	12
13	14 Contact (2) payroll companies. ask them to refer anyone T-65 or older to you.	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

REMINDERS

- DSNP Beneficiaries can be approached year-round. Focus on where they can be found.
  - Discount Stores - Clothing/Furniture
  - Soup Kitchens
  - Flea Markets
  - Food Pantries
- Be visible in your community by volunteering with community groups.

MONTHLY TRACKER

MONTH : **March**

Action Steps

- Join a B2B as a Medicare Consultant. Do not go in as a life or health agent as this is too broad, and chances are they already have someone in that role. Be active and volunteer to do educational meetings to their potential clients.

- Contact (2) payroll companies. Typically, the smaller ones will be more successful. Give them a presentation or your value proposition and ask them to refer anyone T-65 or older to you.

- Continue the same actionables from January and February.

TASK LIST

REVIEW

- Review overcoming objections video.

  Overcoming Objection

- At month end, review your measureables such as BOB completion, number of new referrals, and new associations landed. If ahead of schedule, GREAT JOB. If you are behind, make sure you set a plan to catch up during the following quarter.

- Review the chamber of commerce(s) in your area to learn about them and how many are involved as this will be for next month.

NOTES