MY PLANS | REMINDERS | REVIEWS

AGENT PLANNER 2022



NCC National Contracting Center

MONTHLY CALENDAR

May

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1	2	3	4	5	6	7
8	9 Volunteer with a business or non-profit that works w/ seniors.	10	11	12	13	14
15	16 Partner with realtors to refer business to each other	17	18	19	20	21
22	23 Revisit/Follow-up with your CPAs, financial planners, and payroll companies	24	25	26	27	28
29	30	31				

REMINDERS

- May is going to be a social month where you get involved with your community. Have cards on hand to hand out and flyers to distribute. Be visible in the area with your logo such as pens, hats, and shirts. An example of one of our favorite places to go is the dog park where seniors take their pets. Hand out free frisbees and balls with your company logo. The most important thing is to get your brand and what you do out in your local market.

MONTHLY TRACKER

MONTH : **May**

Action Steps

- Identify a business or non-profit that works with seniors. Ask to volunteer and don't attempt to sell until you get to know them. Ask to do some educational meetings as they are informative without the pressure of buying. If you do a good job, they will tend to turn into calls and eventual sales.
- Partner with realtors and see if they would be willing to discuss Medicare. They will run across people buying houses who need Medicare. Discuss how you can refer business to each other.
- Get back to your CPAs, financial planners, and payroll companies.

TASK LIST

REVIEW

- Examine your digital footprint. Are you out there? Can people find you?
- Read through 'Facebook Toolkit' and reach out to your Sales Support Rep with any questions.

Facebook Toolkit

- Look up "Medicare 101" on YouTube. Watch at least 3 videos. Be preared to discuss on our monthly meeting.

NOTES