MY PLANS | REMINDERS | REVIEWS

AGENT PLANNER 2022



NCC National Contracting Center

MONTHLY CALENDAR

November

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1 Choose 1 ancillary product to promote	2	3	4	5
6	7 Ask EVERYONE you interact with for a referral	8	9	10	11	12
13	14 Draft Thank You responses	15	16	17	18	19
20	21	22 Follow up w/ carrier portals for application accuracy	23	24	25	26
27	28	29	30			

REMINDERS

- Carrier application load is increased now. Plan for delays. Double check carrier portals for application accuracy.
- Begin creating "thank you" correspondence. The more personal the better. It makes you stand out.
- Update CRM with customer information as you find out changes. (existing book especially)
- Find time for mental health breaks. These days are long and there's lots of work. Don't neglect your health.

MONTHLY TRACKER

MONTH : **November**

Action Steps

- Contact Referral network to see if any last minute opportunities. Remind them you're available through AEP.
- Choose 1 ancillary product to offer this month. Ask **EVERY** appointment for that product. (1:3 buy)
- Ask **EVERYONE** you interact with for a referral. Everyone knows someone on Medicare. Be specific ex. brother, father, aunt, pastor, club friend, etc.

TASK LIST

REVIEW

- Check your plan for a last minute push. AEP ends 12/7.
- Continue to check carrier portals and your applications. Make sure what you put in is coming out.
- Review your production against your goals. Are you where you need to be? If not, what can you adjust to get there?

NOTES