MY PLANS | REMINDERS | REVIEWS

AGENT PLANNER 2022



NCC National Contracting Center

MONTHLY CALENDAR

October

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
						1
2	3 Begin setting appointments / giving presentations	4	5	6	7	8
9	10	11	12	13	14	15 AEP Begins!
16	17 Post reminders on social media that you are available for any questions or concerns	18	19	20	21	22
23	24	25	26	27	28	29
30	31 Check carrier portals for accurate applications					

REMINDERS

AEP STARTS 10/15!!!

- Begin marketing AEP plans. You can't get signatures in any applications yet, but this is a great time to start contacting your leads or current B.O.B to set appointments and give presentations so your clients are ready to sign when AEP begins.
- AEP starts on 10/15 each year. Use your leads, current B.O.B. referrals, and all other resources you have available to you to sell as much as you can. Don't forget to post reminders on your social media for your followers to reach out if they have questions or need to review their coverage.

MONTHLY TRACKER

MONTH : **October**

Action Steps

- [x] Make sure you have contacted your clients to schedule meetings starting on 10/15 or talk with them to discuss what changes are needed.

- [x] Review your CRM or calendar that all meetings are scheduled and confirmed.

TASK LIST

REVIEW

- At the end of the month, review your process and evaluate your results. Check carrier portals for accurate applications. The earlier you catch issues the better.

Are you seeing as many clients as you want? If not, what can you do differently?

NOTES