MY PLANS | REMINDERS | REVIEWS

AGENT PLANNER 2022



NCC National Contracting Center

MONTHLY CALENDAR

September

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				1 Order supplies	2	3
4	5 Create carrier contact list and check that carrier/EC links work	6	7	8	9	10
11	12 Send letter to your B.O.B. about what to expect	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

REMINDERS

- Supply chain takes time. Order supplies ASAP.
- Make sure your carrier links/EC link works.
- Begin practicing your presentation by yourself (if it's been a while since you presented.)
- You can't present to customers till 10/1.

MONTHLY TRACKER

MONTH : **September**

Action Steps

- Preparation and organization month. Verify any supplies that will be needed. Have contact information for the carriers you have selected and document. Make sure you have a name, phone number, fax number for SOAs and email so you have quick access. Have a plan of attack on selling, back room support or any other support people or assets.

- Send a letter to your B.O.B. explaining what to expect in the next 45 days. Enclose a form to inform of any changes on doctors, Rx, residential or any other needs they may have for the following year. Contact your Sales Support Specialist to discuss creation of marketing materials.

TASK LIST

REVIEW

- Review your plan for AEP. Make sure you have time scheduled effectively and any supplies needed are ordered. Review the plans that you are selling so you have comfort in selling them. Make sure all required forms for AHIP, carrier certifications and licensing are completed.

NOTES