

# AEP Prep Training



# AEP Prep

- **Certifications**

- **Confirm RTS (Ready to Sell status) all carriers by September 30<sup>th</sup>**

- **Marketing**

- **Letters: Medicare clients, BOB, Friends & Family (Katie's letters available in Agent Back Office)**
  - **Emails: Create emails to be sent at regular intervals, beginning first week of August**
  - **Presentations on Upcoming Changes to Drug Plans in 2025**
  - **Post on social media (about Medicare)**
    - Medicare AEP Dates
    - Medicare memes
    - How you help people (consider a video)
    - Most common Medicare misconceptions
    - Encourage people to like/follow your FB, LI, IG & visit website
  - **Referral Sources**
    - Reconnect with all referral sources
    - Remind them of AEP dates and how you help people
    - Remind them the best way to refer people to you
  - **Health Fairs, Church Events, Community Events**

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- **Social Media – Post! Post! Post!**
  - **Medicare AEP: The one time of year when choosing a plan feels like an extreme sport!**
- **AEP – Annual Enrollment Puzzles! Let's solve the Medicare puzzle together.**
- **Medicare AEP: Your annual quest to find the Holy Grail of health insurance!**
- **Medicare AEP: The magical time when I turn into a Medicare genie, granting you the perfect plan!**



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- Medicare Client Branded Gift
  - Auto Air Freshener



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- **48 Hour SOA, but good for 12 months!**
  - **What's your process?**
    - **Timing**
    - **Use Plan Enroll**
  - **Calendly availability**
- **Client Meetings**
  - **Flow of meetings/quotes/enrollment**
  - **Meet & Greet, SOA/Plan Enroll, 60-minute meeting w/quoting & enrollment**
- **Paperwork**
  - **New Client Questions**
  - **Needs Analysis**
  - **Enrollment Receipt**
- **After The Sale**
  - **Thank You Note w/Enrollment Receipt**
  - **Scan Paperwork to Your Computer**
  - **CRM**
  - **Confirm Receipt of New Insurance Cards**



**HAVE A GREAT AEP!**