



AEP is Over. It's December 8th. What Should Insurance Agents Do Now? They use Eldercare's Ultimate Post-AEP Checklist!

First, we would like to give you a pat on the back, we very much appreciate all your hard work. We know how stressful and busy the Medicare Annual Enrollment Period can be for you all. While it is December 8th and AEP is over, we highly recommend not letting off the gas just yet.

This Checklist is guaranteed to help you keep those new clients on the books and grow your book even more for AEP next year.

☐ Step 1: Celebrate 🎉

Celebrating stimulates a dopamine release in the brain, a feel-good chemical that reinforces the learning experience and strengthens our sense of connection to those we work with. You made it through the busiest selling season, and you deserve it.

☐ Step 2: Organize Client Info 📁

Take time when the AEP is over to go over your client notes. Make a spreadsheet or document with clients' names, their current plan, their preferred contact method, and any other information that you want to remember. This step is vital in making the next steps easier!

Tip: We highly recommend utilizing the MedicareCENTER CRM platform to get your data organized. You can Import, set the Stage and create custom Tags.

□ Step 3: Send Thank You Cards

Whether you realize it or not, insurance agents are in the business of caring for people. They sell certainty in an uncertain world.

Custom thank you cards are a great opportunity to stay in touch with your clients and express your gratitude. Not only does this make them feel good about their decision, but it also makes it more likely that they'll spread your name to friends, family, and associates.

Tip: Eldercare can you create a custom Thank You Card! [\[Submit Your Request Here\]](#) and you can easily export a list of your clients from the MedicareCENTER CRM.



□ Step 4: Prepare for OEP

OEP Starts January 1, so don't wait to start planning. While you CANNOT share materials advertising the ability to make a plan change or referencing the OEP in anyway, there are still things you can do. Here are the top three things we recommend doing during OEP:

1. **Provide exceptional customer service:** Call, yes CALL, each of your clients in January and make sure they have their Insurance Cards and have made their Wellness appointment.

Tip: You can create Tasks within the MedicareCENTER for each of your clients for a Q1 Check-In (this will ensure no-one gets missed and why the above Step 2 is so important).

2. **Cross-Sell to Maximize your Success:** After you help a client enroll into a Health Plan, why stop there? A good agent helps clients with their immediate coverage needs. A **great agent** checks if they can round out their clients' coverage and limit their out-of-pocket spending even further. Your clients will likely appreciate the gesture, and you'll have opportunities to earn some extra commission!

3. **Keep Marketing:** Conduct marketing activities that focus on other enrollment opportunities, including age-ins, dual-eligible and LIS beneficiaries.

□ Step 5: Recap and Revamp

Right after we've been in the AEP storm, it's the perfect time to plan for what we'd do differently next year. No matter what your current book of business looks like, reflecting on AEP is so important. Before you know it, it'll be next year, and you'll have forgotten everything about last year's AEP. Here are just a few questions you can ask yourself:

- How many leads did you get?
- How much did you spend on marketing & advertising?
- How many events did you hold?
- Which marketing efforts produced the best leads?
- Which Pre-AEP communications worked best?
- When should I submit my pieces for Compliance?
- Who should I prioritize to see first?
- What efforts could have fostered more leads?
- What can you delegate out next AEP to give yourself more time to sell?

Once you've completed the EIS POST-AEP Checklist, it is vital to take a little "you time" before implementing changes and improvements in the business. Ideally, you would want to complete this checklist next week (Dec 12-16), that way you can have a *good two weeks of uninterrupted rest*. After all, you just finished what was effectively the equivalent of running a marathon in the insurance world.

Your success is our success, and we want you all to know that we value each and every one of our agents as a partner. We want to also take this opportunity to express our sincere THANKS. Eldercare has been experiencing another outstanding AEP thanks to all of you!

Thank you,

Your Eldercare Family

Trainings in reference to the above:

- Cross-Selling to Maximize your Success:
<https://youtu.be/pTy2HTCoY7g>
- Everything You Need to Know about OEP:
<https://youtu.be/R9jXceCULJ8>
- Organizing Your Client Data on MedicareCENTER:
<https://vimeo.com/759721211>