

ABCs of AEP: 5 Tips for a Successful AEP

Leveraging preparation and strategy for AEP sales



AEP is about seven weeks long, and you'll need every day of that to close sales with clients and prospects. Use these five tips to help you be ready before AEP starts!

01



Summer Preparation

Summer months — especially late July into early August — are HOT with opportunities to get ready for AEP.

- Carriers and organizations release certification courses starting in July for selling Medicare Advantage and Part D plans.
- Carriers will release next year's plan details starting in August. You can map out the changes and prioritize client groups by assessing which plans might have strong client interest..

02



Use AEP Time Wisely

Your most valuable resource is time, so getting organized from the start is crucial:

- Do lead acquisition and prospecting early so you know where to focus communication.
- Allow time for obtaining permissions to contact and SOAs well ahead of scheduling meetings.
- Have your post October 1st plan reviews booked with clients in September.

03



Retain Current Clients

Even if it's your first AEP, you may already have clients who will need your attention:

- Reach out to current clients to have them update their PlanEnroll profile prior to October 1st with current health information.
- Treat any new client like they've been — and will be — your client for years. Make sure they know they can reach out anytime, and you can help with questions regarding life changes or health need changes.

04



Explore Cross-Sales

Your clients and prospects may have more insurance needs beyond Medicare:

- Ask questions that help to understand the full scope of your client's needs, such as family history of illness or a worry about care options. This gives you insight into whether an ancillary product could help meet their needs.
- Always follow compliance rules when exploring cross-sales. You can schedule a follow-up meeting to discuss other product options with your client.

05



Get Expert Help

By partnering with a Field Marketing Organization (FMO), you can access powerful resources for AEP and all year round:

- FMOs can help independent agents with the services to help their business grow, like marketing resources or mentorship.
- Partnering with an Integrity FMO allows you to access Integrity Technology to manage every step of your acquisition, sales and marketing process — at no cost to you!

AEP will be here before you know it. Now's the time to start getting ready.