

ABCs of AEP: Staying Organized

Gather your resources for maximum AEP results



Staying organized means you can spend less time thinking about what to do next and more time taking actions. Use these tips to help you manage your AEP preparation time to ensure you're ready!



Information Management

Even if you're fairly new to insurance, you probably still have information that is relevant to your business. Client data, phone numbers, other networking contacts, emails, a calendar, business administration and more.

Take time as soon as you can to start a practice of organizing your work information. Here's a few things to get you started:

- Set aside time to get caught up on digitizing info. This means entering written contact info into your CRM, scanning any documents that need saving and typing paper notes into a digital note application. As an Integrity agent, you have access to a no-cost CRM platform through Integrity.com — ask your FMO for more details!
- File away papers that are not immediately needed — and use a filing system that makes sense to you. You might store all policy brochures in one location or organize alphabetically — it's all up to you.





Big-Picture Calendar

If your days are filled with callbacks and appointments, it's hard to see the bigger picture. Use a calendar to help structure several months at a time of key dates and deadlines.

JULY 2025

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	1	2	3	4	5
6	7	8 <i>Example: carrier X training</i>	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

AUGUST 2025

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

SEPTEMBER 2025

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

OCTOBER 2025

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	1 <i>Marketing to consumers can begin</i>	2	3	4
5	6	7	8	9	10	11
12	13	14	15 <i>AEP starts</i>	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1



What's Worked Before?

Whether you have detailed metrics or just a sense of your sales so far, now's the time to bring that back into your awareness and make some choices. In the space below, use these starting questions to capture your thoughts.

- What has been working well for getting enrollments?
- Where do your best leads come from?
- Are your sales mostly new clients, existing clients or a mix?
- Was there anything you would do differently if you could do it again?

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



Write Down Your Goals

Now that you've reviewed your sales wins so far, it's time to dream up your goals for this AEP. Here are ideas to get you started:

- Decide the general focus of your goals. Maybe you want to have more clients, or set more appointments or increase your income. Each of these goals takes a different focus.
- Get specific with your steps. Let's say you want to grow your clients:
 1. Write down some goal numbers for new clients.
 2. Make some time calculations: How many appointments do you need to enroll your desired number of new clients? How long will each appointment take?
 3. How many leads will you need to book the appointments? How much time will be needed to work the leads?

Goal 1:

Goal 1 steps:

Goal 2:

Goal 2 steps:



Gather Your Resources

You've cleaned up your files, looked at the calendar, looked at successes and made some goals. Now you'll need to gather the resources that will help you thrive at every aspect of preparing for AEP. Fill out this chart and get started today!

What is the resource needed and for which task?	Where can you find this resource?	What is the cost of the resource?
Example: Training materials to learn how to use a CRM to input client information	Example: Integrity training guides, webinars	Example: Free, takes a few hours or less

Final Note: For a bigger-picture look at AEP preparation, ask your FMO for the rest of our **ABCs of AEP** materials to plan your AEP efforts for the whole season.