

THE ULTIMATE 2025 AEP TACTICAL BATTLE PLAN



SENIOR MARKETING
SPECIALISTS

AN INTEGRITY COMPANY

JUNE

JUNE 2024

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9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

HEAD'S UP!

- **Carrier Sneak Peeks come out.** *(Note: these won't be as reliable for benefits this year, carriers will be refileing, etc. It's best to use sneak peeks for service area and new plan offerings only.)*
- **It's an election year!** Ad space and pricing will be at a premium as a result.

TO DO:

Schedule time to certify this month.

[View the carriers on our AEP Toolkit page for details!](#)

- ✓ UHC - 6/1/24 Fast Track and 6/8/24 for everyone else
- ✓ AHIP - 6/24/24
- ✓ Devoted - 6/25/24
- ✓ Zing - 6/25/24
- ✓ Aetna - 6/27/24

Get contracted with **EVERY** carrier in your market. We won't know final plan benefits until October 1st, which means you need all your options open this AEP to stay competitive with other agents. Getting contracted with every carrier will ensure you don't fall behind the competition.

- [See our How to do Business Guides here!](#)

Get to know your carrier reps. This can be pivotal for success this AEP.

MARKETING

Send out the [AMP Summer Newsletter](#) via email to clients.

[Buy stamps](#) you'll need for AEP —July 14th prices increase on stamps.

EVENTS

Start securing places to hold events/kiosks **prior** to AEP.

Start looking at places to hold events/kiosks **during** AEP.

Schedule and reserve your **ANOC** meetings and appointments.

STAFF

[Recruit and hire any extra staff needed for AEP.](#)

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JULY

JULY 2024

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28	29	30	31			

HEAD'S UP!

- **Carrier Sneak Peeks come out.** *(Note: these won't be as reliable for benefits this year, carriers will be refiling, etc. It's best to use sneak peeks for service area and new plan offerings only.)*
- **Presidential election campaigns start.**

TO DO:

Schedule time to certify this month.

[View the carriers on our AEP Toolkit page for details!](#)

✓ Cigna - 7/1/24

✓ Anthem & Humana - 7/2/24

✓ Essence - 7/25/24

Have all certifications and contracting done by July 31st.

STAFF

Train extra staff needed for AEP

Virtual Medicare Quick Start Training hosted by Senior Marketing Specialists – Week of July 8th

In-Person AEP Bootcamps (July 23rd Blue Springs, MO / July 25th St Charles, MO / July 31st Columbia, MO)

- [Register for events here!](#)

TECHNOLOGY

Set up [MedicareCENTER](#) and become fluent with the technology.

Understand the enrollment process and streamline it.

Make sure call recording and virtual appointments are streamlined.

Make sure your AEP staff know how to use the technology as well.

MARKETING

Send out our compliant pre-AEP client letter with information intake / drug list forms.

- [Find these on our AEP Toolkit](#)
- Make sure all drug lists are secured by the end of July.

Communicate with ALL CURRENT CLIENTS for AEP, whether by email, mail, or phone call. This is urgent for your success as approximately 70% of seniors are expected to shop plans this year.

Reach out and **schedule CURRENT CLIENTS as needed for AEP appointments** so you know how many open spots you have for potential new clients.

Connect with networking partners for upcoming AEP.

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AUGUST

HEAD'S UP!

- ALL CERTIFICATIONS should be done!
- You should be contracted with every carrier in your market area.

AUGUST 2024

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25	26	27	28	29	30	31

TO DO:

Prepare to [order virtual supplies](#) if they're available, physical supplies likely won't be ready until October 1st (if at all).

MARKETING

Finish scheduling **CURRENT CLIENTS** as needed for AEP appointments so you know how many open spots you have for potential new clients.

STAFF

Continue to train extra staff needed for AEP.

- **Virtual AEP Operations Training** hosted by Senior Marketing Specialists – Week of August 5th.
- [Register for events here!](#)

APPOINTMENT PREPARATION

Start looking at active policy holders (now that your client drug lists are back) and think about how you can group clients together to host events or group meetings with similar clientele.

- This is important to start thinking about **NOW** so you can strategize how to handle group meetings even if plan details aren't available until October 1st. Depending on how many clients you have in your book of business, **group events and meetings could save you from losing many clients this AEP.**
- **Potential ways to group them** —clients with high utilization of drug plans, clients in areas of service reduction, clients that [MedicareCENTER](#) identifies as high-risk shoppers, etc.

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SEPTEMBER

SEPTEMBER 2024

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HEAD'S UP!

- Cancer Awareness Month - [see resources here!](#)
- ANOC letters go out.
- [CMS Landscapes](#) may come out at end of month
- The ability to pre-order physical applications for carriers may not be available this year, be prepared to download/print your supplies as needed.

TO DO:

Prepare your office for success.

- ✓ Stock up on snacks, office supplies, Tylenol, and hydration.

MARKETING

Send out the [AMP Fall Newsletter](#).

Download and prepare AEP letters to send to clients (*these cannot be sent until October 1st*).

- [Find these on our AEP Toolkit!](#)

APPOINTMENT PREPARATION

Finish looking at active policy holders and think about how you can group clients together to host events or group meetings with a similar clientele.

- This is important to start thinking about NOW so you can strategize how to handle group meetings even if plan details aren't available until October 1st. Depending on how many clients you have in your book of business, group events and meetings could save you from losing many clients this AEP.
- Potential ways to group them—clients with high utilization of drug plans, clients in areas of service reduction, clients that [MedicareCENTER](#) identifies as high-risk shoppers, etc.

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OCTOBER

OCTOBER 2024

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HEAD'S UP!

- October 1st – AEP Marketing Can Start!
- October 15th – AEP Begins!
- [CMS Landscapes](#) may come out at the beginning of the month.
- Cost of Living Adjustments (COLA) announced – see [our blog](#) for when it's published.
- [Star Ratings come out!](#)
- Digital (PDF) carrier supplies will be available, [order supplies here!](#)

TO DO:

Review non-commissionable plans for the year (*predict higher numbers of plans than normal*).

Meet with clients.

EVENTS

Host ANNOC events to get yourself in front of as many clients at once as you can.

MARKETING

Send out client letters you prepared in September.

Send out our [AMP AEP Newsletter](#).

Medicare and You Handbook is mailed to 65+ year olds, send clients a digital copy.

- [Find this on our AEP Toolkit!](#)

OTHER...
