

# NOVEMBER/DECEMBER TO-DO LIST



SENIOR MARKETING  
**SPECIALISTS**

(800) 689-2800 | [smsteam.net](http://smsteam.net)



**GET SOCIAL:** Let Senior Marketing Specialists help strengthen your brand and optimize your online presence utilizing Social Media. Visit [smsteam.net/social-media](http://smsteam.net/social-media) for more information!



**BOOK INTO NEXT YEAR:** Schedule first quarter follow up appointments to ensure your clients have booked their yearly wellness visit, used their plans, verify in-network doctors, and drug coverage. Don't forget about the **Open Enrollment Period** that runs from **Jan 1 - Mar 31**.



**TARGET LOCAL BUSINESSES:** Start a list of those you frequent. Bring muffins or donuts, and ask if you can display the special edition AEP newsletter.



**VIRTUAL EVENTS:** Consider booking weekly virtual events throughout AEP. Many local Medicare Advantage representatives are happy to help. Contact us for ideas.



**OFFER ANCILLARY PRODUCTS:** When reviewing their products, make sure that they understand gaps in their coverage and help them relax knowing they are covered.



**SEND THANK YOU & HOLIDAY CARDS:** It's important to have 7+ touch points with your clients and partners. A perfect time to say "thank you" is at the end of the year.



**DOUBLE CHECK YOUR CLIENT LIST:** Contact your clients to ensure they feel comfortable with their coverage. Make sure all applications are issued and approved **before Dec 7th**.



**CREATE "GO KITS":** These kits can be handed out while networking and can include a business card, Clever Rx Card, Medication Trackers, Event Flyers and even a piece of candy.



**PROTECT YOUR RENEWALS:** Verify that you are Ready-to-Sell with all carriers that require certification to retain commissions in the next year.



**SET NEXT YEAR'S GOALS AND PLAN FIRST QUARTER:** Evaluate systems and processes and determine if additional people, training, or carrier contracts are needed.



**PLAN TIME FOR YOURSELF:** It's important to take care of yourself so you can take care of your clients.