

NOVEMBER/DECEMBER TO-DO LIST



SENIOR MARKETING
SPECIALISTS

(800) 689-2800 | 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 for more information!



BOOK INTO 2021: 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 2021.



SET 2021 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.