

5 AWESOME AEP



Marketing Tactics

1

LETTER

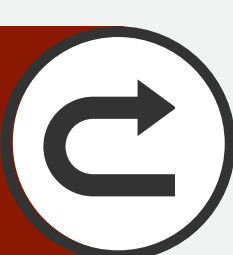
CAMPAIGNS

for clients who should stay on or switch coverage



Analyze your book of business to determine which clients should stay with their current coverage and which clients should change.

If you advise clients to stay with their current plan, use [this compliant letter](#).



If you feel clients should review their coverage, send them [this compliant letter](#).

2

INDUSTRY

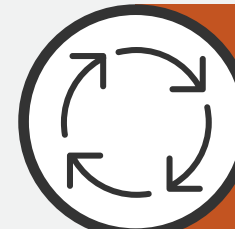
REFERRALS

put your professional connections to good use



Reach out to other industry professionals to discuss referral-based partnerships.

P&C agents, estate planners, banks, pharmacies, and others may give you referral business in exchange for the same.



3

CLIENT

REFERRALS

your clients know people that need your services



Leave extra business cards with clients. Tell them you are available to help their friends and family too.

Hand-write notes thanking clients for their time. This sentiment is something they will share with others.



4

LEAD

CAMPAIGNS

help you find prospects that need your services



Carrier Overflow: Ask local carrier offices if they have extra leads or need help enrolling. Only use these leads for their product.

Seminars: Carriers may also have seminar opportunities. Offer to perform one for them. Always ask about Part C & D restrictions.



Internet Leads: While instantaneous, these leads require a quick response time. Remember you are up against call centers.

5

SMS

AMP PIECES

cater marketing materials to your business style



Our AMP, or [Agent Marketing Portfolio](#), program allows agents to customize a variety of marketing materials... for free.

Find everything you need from door hangers and medication trackers to business cards and newsletters in [our catalog](#).



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