

Finish Strong this AEP

November is coming to a close, and the end of AEP is upon us. Hopefully, your hard work has paid off with a successful campaign launch, and applications are still pouring in. Keep it up and finish strong this AEP with these helpful tips.



Check the Medicare Plan Finder to ensure your plan information is correct. Even a tiny mistake could cost you hundreds of clients.



Meet with your sales team and agents to discuss positives and negatives. Take advantage of the good and address the bad.



Send an “App Chaser” to Prospects by email or direct mail to those who have an application but didn’t enroll. This can work for you as a compelling lead converter.



Follow up with your leads using emails and phone calls.
The more you positively interact with prospects, the more likely they are to switch.



Conduct tests and optimize across all parts of your business. Review your results frequently to make sure you are not missing opportunities or any issues. This analysis will also be helpful for future years.



Meet with your key Providers. Make sure they understand your plan and ask if they would send out an Affiliation Letter. You may find that they are willing to participate in your Facebook presence or newsletter.



Don't forget your Provider-backed plans. Collaborate with your providers and staff to promote your plan and make sure they know the latest CMS guidelines.



Rectify your budget weekly. Prices change, and you may find yourself under budget. Be sure to reallocate these funds to achieve your goals best this AEP.



Compare your progress and goals. Keep a close eye on your data to monitor your progress. If something is off, discover the reason quickly, so it doesn't become a problem.



Contact your disenrolled members with a follow-up to let them know their benefits end on December 31st. Recommend that they give you a call if they made a mistake in disenrolling or change their mind about their new plan.



AEP only comes once a year, and we at Agent Pipeline know to make the most of every second.
For more tips on strategy, planning, and much more -
contact us today at 800.962.4693

