

# 2022 AEP REFLECTION

## What Did You Do Well?

**AEP is a busy and stressful time of year for many.**

**You've made it through, so take some time and reflect on what you've done well and take note of what you've learned so you can apply it next year.**

- How many enrollments did you complete this year?
- What worked well in getting enrollments? Did you switch up your presentation or use new technology to help you? *Be specific about it and really think about why you had success.*
- Where did your best leads come from? *How much did they cost?*
- Were your marketing efforts successful? What campaign got the most positive response? *Why?*
- Did your clients give you any referrals? *Why?*
- Did anything unexpected happen? *How did you overcome and adapt to the situation?*

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## How Can You Improve?

**Even if you had a fantastic AEP there is always room for improvement.**

**Below are some common areas of improvement everyone should consider.**

- Leads can be a positive for some and a negative for others. Did you receive enough leads this year? Where did you expect to get leads from? *Why didn't it work? What can you do next year to improve your lead production?*
- How did you manage your time this AEP? What did you spend the most time doing? *What can you do to streamline this process?*
- Did you have enough products to offer clients? Would offering additional products help you close the sale? *What options could you add to your portfolio to better serve your clients overall?*

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