



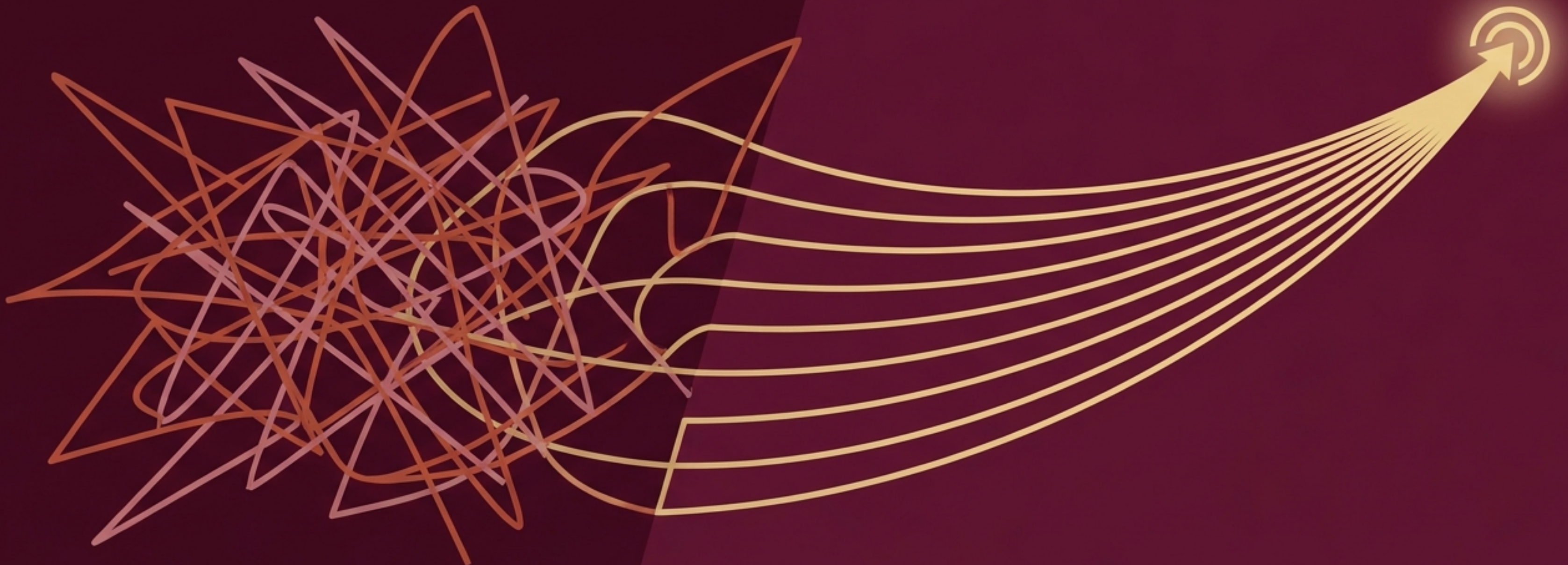
**AEP Game Plan**  
**Systematize Medicare's**  
**Busiest Season**

# A Logistics Problem Dressed as a Sales Problem

AEP is the 8 weeks defining a Medicare agent's year.

Agencies that run a system grow; those that wing it lose ground.

It is not a sales sprint—it is a logistics operation.



# The Twin Stakes of the Season

Determines this  
year's commission.

**Secures** next year's  
renewal book.

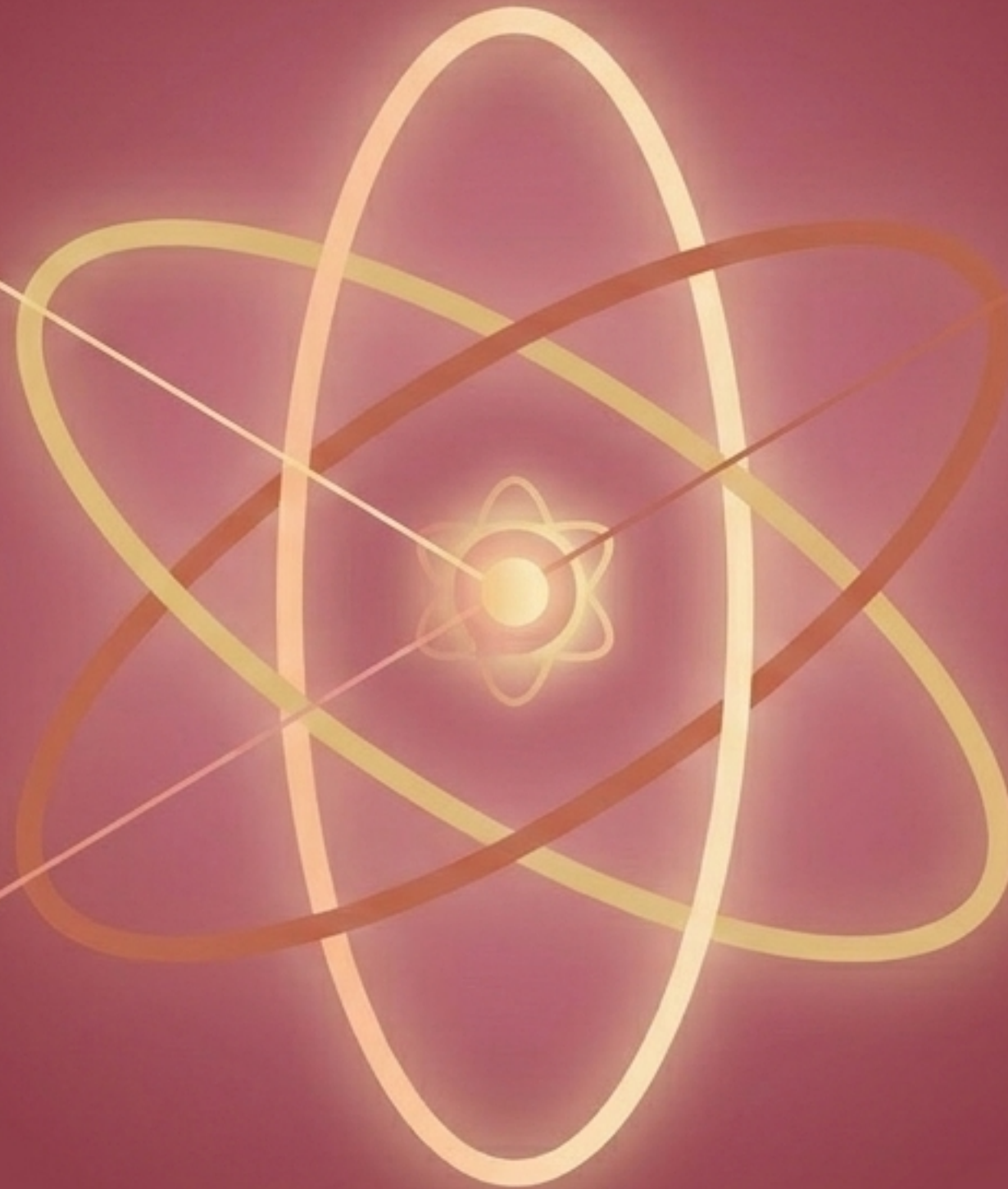
Top agents build the  
machine in July to run on  
schedule in October.

# The Compounding Effect of Market Shifts

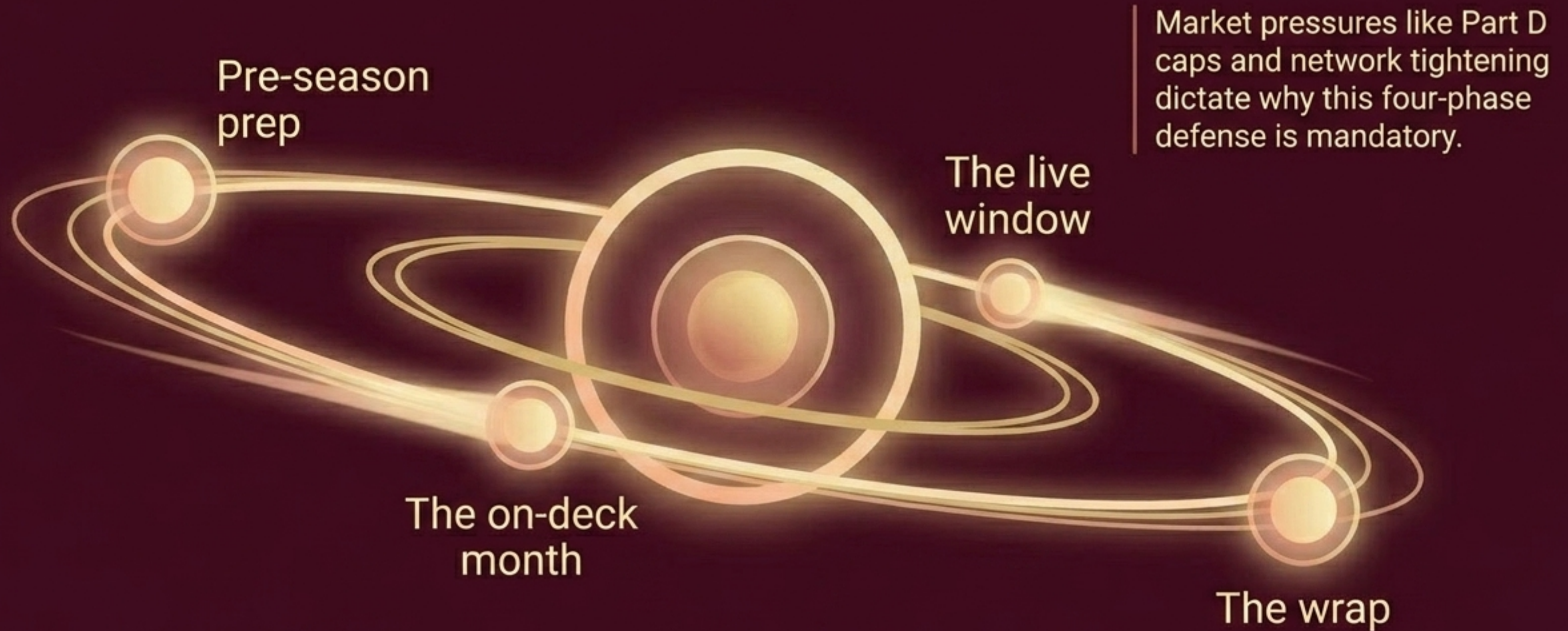
Every plan switched and gap surfaced becomes residual income.

Major carriers pulling back and shifting premium structures.

Miss the touch, risk the renewal.



# Speed and Structure Win the Game



# Phase One: Pre-Season Leverage



Runs May through July.

Complete AHIP the first week of June.

Knock out carrier certifications the day they drop in July/August.

---

Waiting until September guarantees server slowdowns and missed appointments.

---

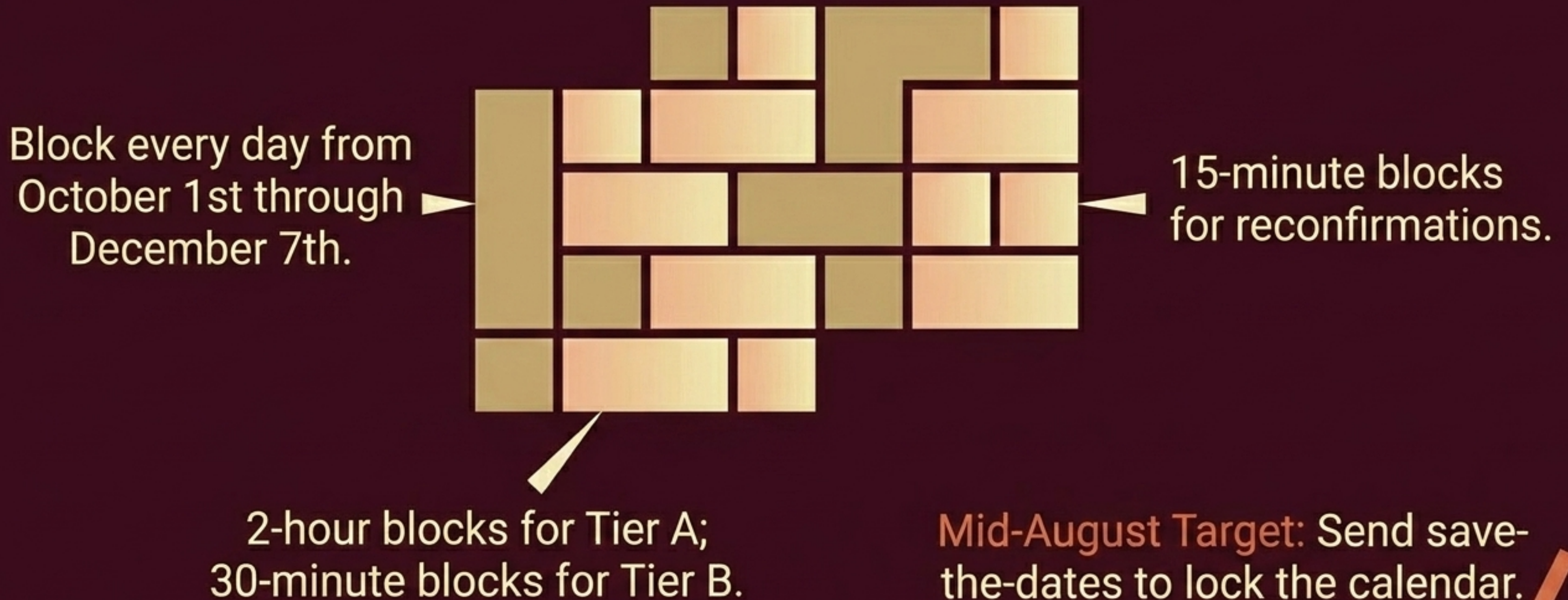
# The Mandatory Weekend Audit

Pull every MA and Part D client into a single list.



Note current plan, prescriptions, doctor, and anniversary.

# Build the Appointment Machine



# Front-Loading Lead Flow

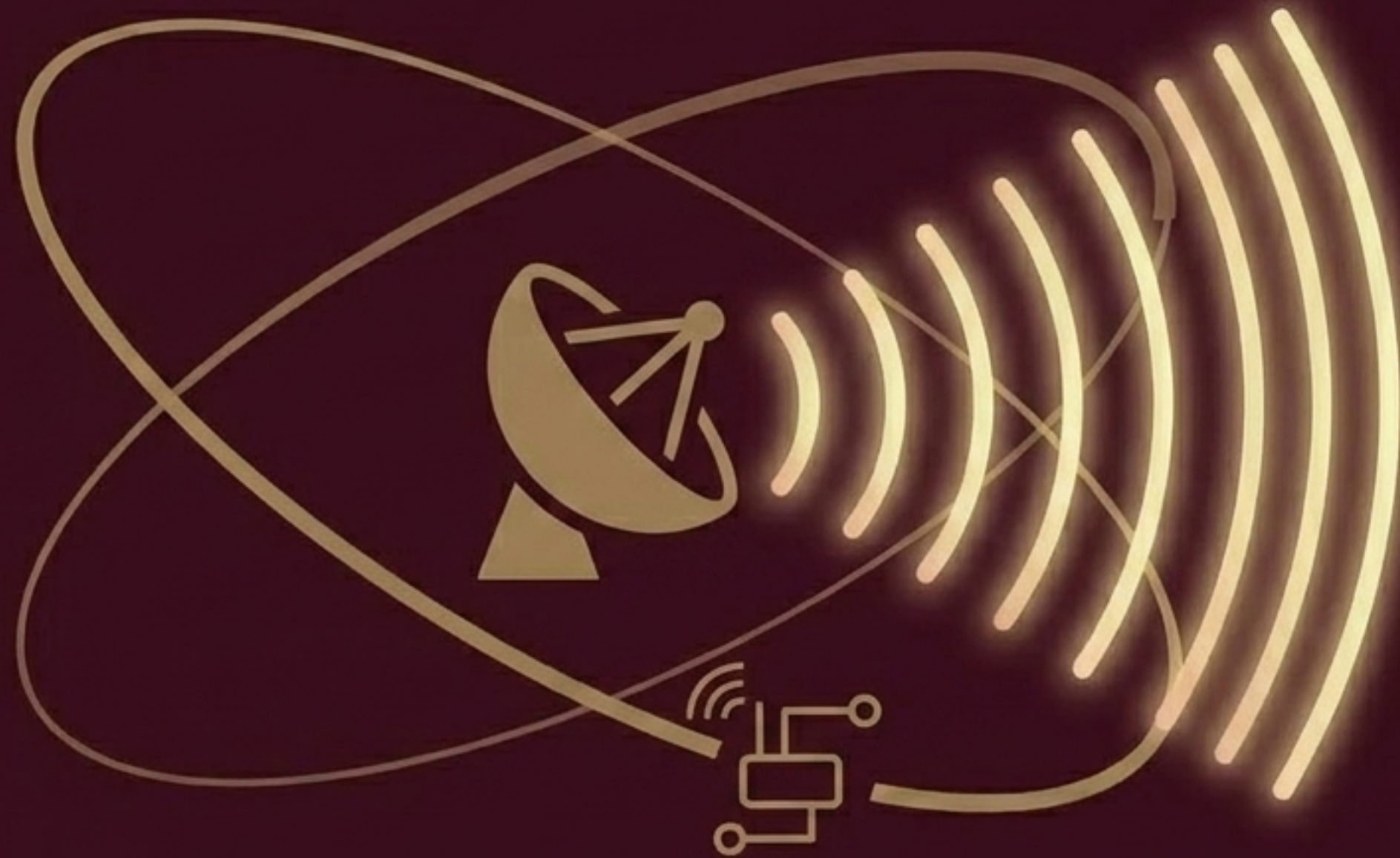
New prospect generation must peak in August and September.

Deliver leads with enough time for October 15th appointments.

Direct mail, events, and ads must run before October hits.

October

# Phase Two: The September Dry Run



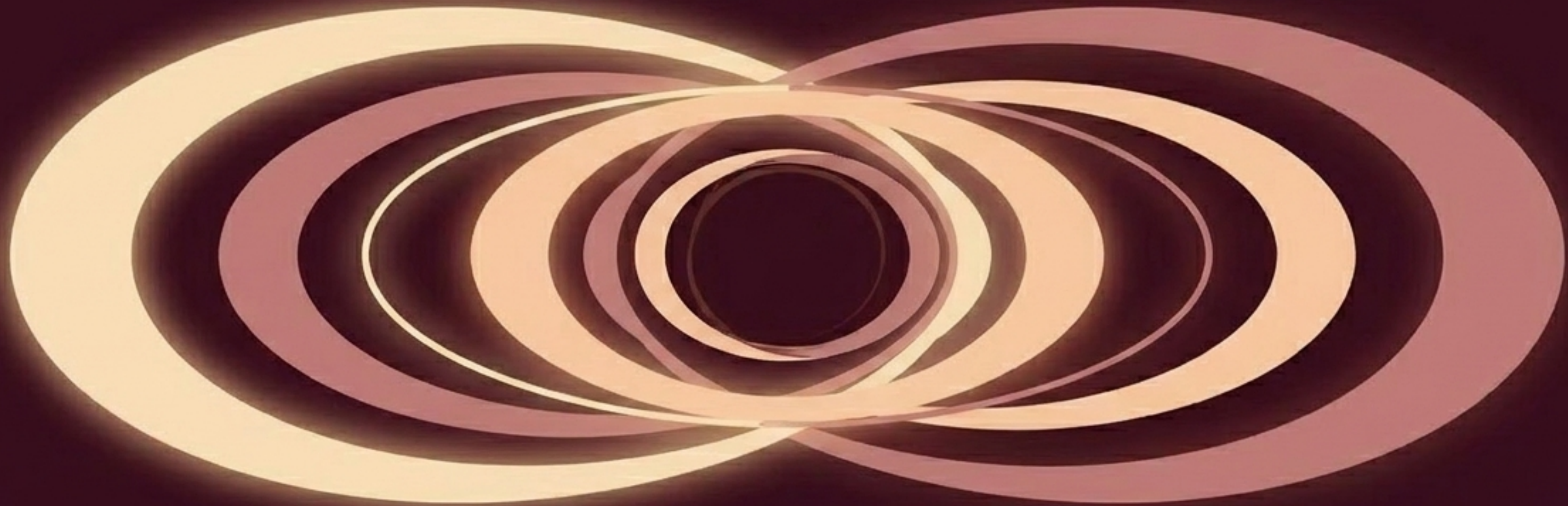
Lock in every operational detail.

Confirm all appointments and send agendas.

Test quoting engines, portals, and screen-share workflows.

Do not discover your SOA process is broken on day one.

# Prevent Operational Chaos



## Staff Training

Train support on data entry and communications. Define who does what.

## Landscape Intelligence

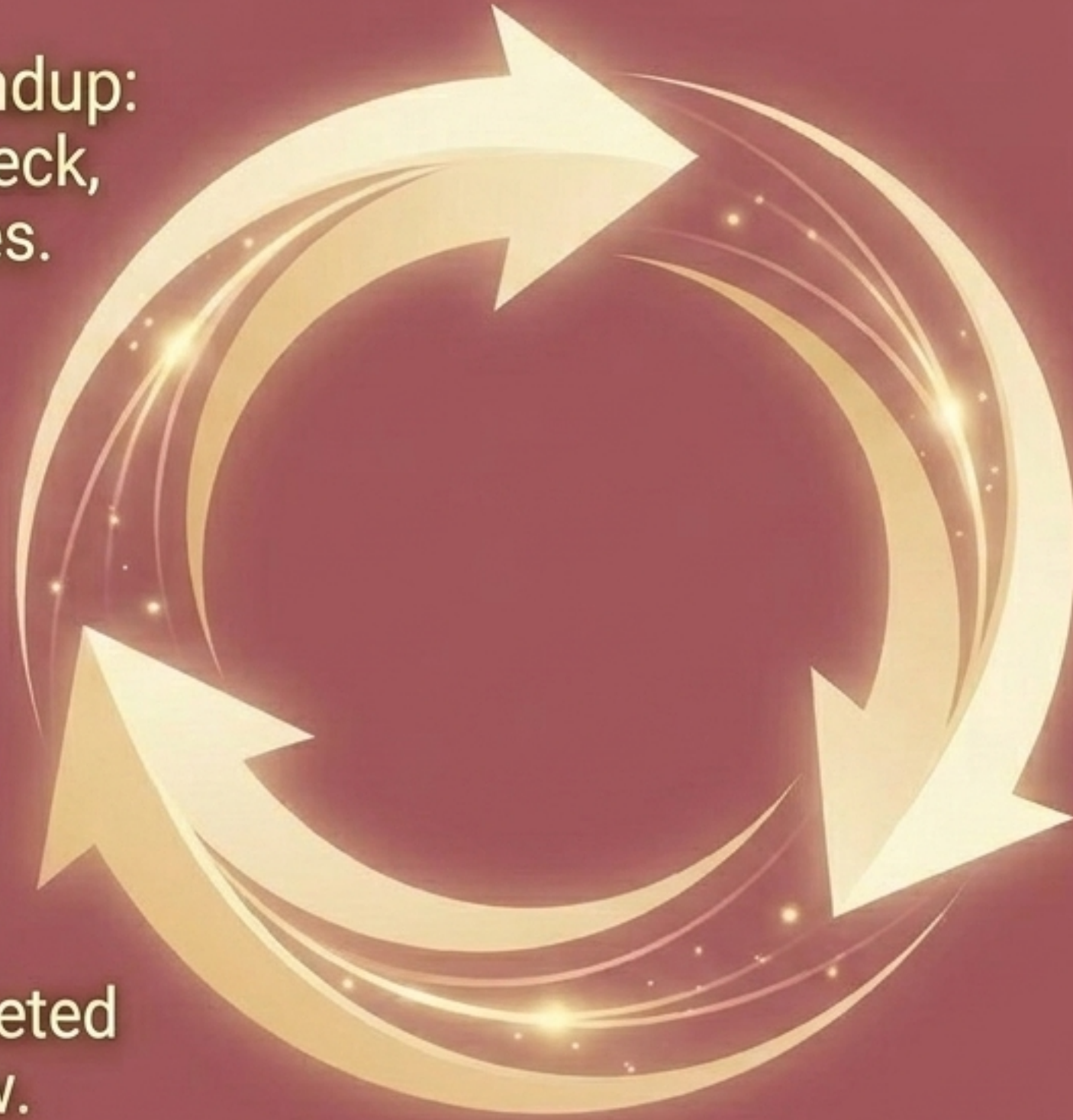
Review network shifts and premium changes to speak confidently in every appointment.

# Phase Three: Pure Execution

The Live Window: Oct 15 – Dec 7.  
Calendar, certifications, and workflows are already locked.  
Your only job is to run the agenda, not invent it.

# The Daily Rhythm and Single Checklist

Morning Standup:  
Calendar check,  
open issues.



Appointment Protocol:  
Verify ID, capture SOA,  
compare plans, enroll.

Evening Close:  
Log CRM, review completed  
tasks, prep tomorrow.

# Pace the Marathon



## Non-negotiable rules:

- Log everything in the CRM before the next call.
- Protect a daily 1-hour block for admin updates.
- Protect a half-day weekly for catch-up.

Burnout by Thanksgiving costs you the lucrative December push.

# Phase Four: The Wrap Window



Runs December 8th through January 31st.

Block the first two weeks of January strictly for client service.

Intercept pharmacy issues, network snags, and missing ID cards immediately.

# The January Post-Mortem

Phase 1

Pull the final numbers: reviews, switches, gains, and losses.

Identify operational bottlenecks.

This document becomes the prep blueprint for next May.

# The Chaos Baseline

12-hour days with missed clients.

Applications trapped in folders for weeks.

240 apps written, but 30 clients lost to competitors.

# The System Takes Over

310 Apps

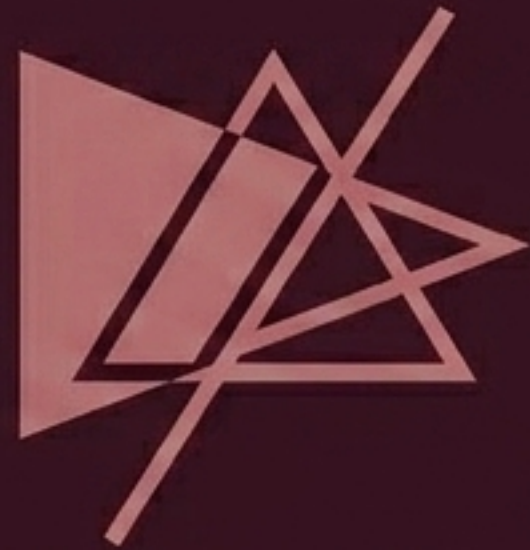
96% Retention

Up nearly 30% in volume.

Admin handled triple the volume in the same hours.

Agent took late December completely off.

# Two Traps to Avoid



## Treating AEP as Lead Gen

October is for book management. Chasing prospects in fall derails the calendar.



## Skipping the August Audit

Going in without a clear list forces reactive chaos. The audit is the foundation.

# Protect the Margins

## Over-booking Slots

Back-to-back hour blocks ensure you fall behind by 10 AM. Buffer time is mandatory.

## Ignoring January

Retention is won or lost in the first three weeks of the new year when snags hit.



# The Immediate Blueprint

1. Pull and tier your Medicare client list.
2. Block your exact 8-week calendar today.
3. Schedule AHIP for the first week of June.

AEP rewards systems, not heroics. Clients stop shopping when they know they are already on your calendar.