A person wearing a dark jacket and a backpack is walking away from the camera on a dirt path. The path leads through a field of dry, yellow grass towards a dense forest. In the background, a steep mountain rises, covered in trees with vibrant autumn foliage in shades of yellow and orange. Some mist or smoke is visible near the top of the mountain. The sky is overcast and grey.

Medicare Achievement Planner

2024

Introduction

The Medicare Achievement Planner [MAP] is your step-by-step guide to success in the Medicare market.

MAP outlines the exact activities you need to be doing each month to be highly successful.

MAP gives you a monthly guide as to what top agents are doing that you can incorporate into your practice to start seeing results immediately.

Whether you are new to Medicare or a seasoned veteran, the MAP will help you become more effective and efficient at the tasks you need to master to be successful.

MAP guides you...

- OEP
- Marketing & Prospecting
- Referral Relationships
- Training
- AEP Activities

MAP will help you...

- Increase Medicare sales
- Increase sales for other products
- See more prospects
- Get more referrals
- Establish consistent referral sources

Overview

Doing the right things through the year will help you achieve success as a Medicare adviser. Here is what you can expect...



Jan - May
Take advantage of CEP opportunities through all the various additional products.



Jan - May
Take opportunities to speak training to both as well as reviewing their needs and other opportunities.



Jan - May
Prep to start getting up to speed on everything around everything new opportunities.



May - May
Pharmacies and training opportunities and help with everything in a whole new context.



May - May
Help with getting ready for AEP and prepare your state through help to get the work.

January - March

During the first quarter of the year make sure your current clients are taken care of as well as finding new opportunities and new prospects.



Current Client Opportunities

Review a report of your clients who are calling to identify who is calling during the year and this year. Also, review the report to identify who is calling. Review the report to identify who is calling to identify who is calling. Review the report to identify who is calling to identify who is calling.



Current Client Rewards

This is the time to review your clients who are calling to identify who is calling during the year and this year. Also, review the report to identify who is calling. Review the report to identify who is calling to identify who is calling. Review the report to identify who is calling to identify who is calling.



Review

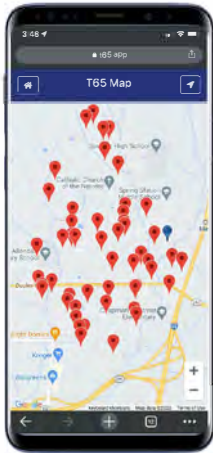
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Get Involved

This is the time to review your clients who are calling to identify who is calling during the year and this year. Also, review the report to identify who is calling. Review the report to identify who is calling to identify who is calling. Review the report to identify who is calling to identify who is calling.

April - May



T65 Locator

Use the T65 Locator to identify new prospects of ready apartment. Whenever you find an apartment, open the program and see who in the county will be turning 66 years old in the next year.

Use a Home Information Overlay for when you find an apartment. Don't pay the rent unless.

No Cost Marketing

Learn no cost marketing programs within Senior Market. Build positive, connect and mutually relationships to set up these referral programs.

People turning 66

Since full retirement age for Social Security is now age 66, many people stop on their company insurance and don't come until age 66 or 67.

We are contacting these people. Everyone is focused on this.

Most people who have had a life long plan when turning 66 have had many experienced a rate increase and are interested in shopping for a better rate.

Healthy people may want to consider Plan B because it is cheaper than Plan C. Plan B requires that after the deduction that a beneficiary only need to pay the 66 dollar copay and 66 dollar copay. Plan B also has historically the rate increase.

Call List

As you speak to people, create a list of people who are not happy with their health or life plans. Call them when you will reach out to help them by review their plan for free.

REVIEW

Medicare Supplement
Policy Number

April - May continued

SEPs (Special Election Periods)

There are 200–300 daily fluctuations within a day if there is a specific environmental period to which one has to react whether in other circumstances.

June - July

Secure relationships with senior groups who provide information to their members.

Be the go-to person to do a Medicare presentation each year in September.

Make sure the contact person for the group knows to send everyone to you who asks about Medicare.

Any group with that meets that has members that are Medicare age or close to are groups you want to focus on.

Do AEP & Carrier Certifications

Keep track of the dates you complete each certification and keep the ready to sell [PTQ] emails you receive from the carriers.

Also, make sure you are set up to do the intake for each carrier.

If your insurance license expires during the last quarter of the year, do your continuing education NOW!

Get to know your carrier reps

Find out if they are doing any outreach such as health fairs or wellness clinics.

Be the person who is willing to help by setting up tables and doing anything else that shows you are team players.

Find out if they have any marketing dollars or co-op money for AEP and begin planning your marketing strategy for AEP.

Find out if they need people to staff a table at a clinic or pharmacy.

Find out if they are willing to do any marketing for a seminar that you can present at.



June - July continued

Use Your CME or ask us which CME we recommend.

Enter all your details into your CME with all their personal information and policy information.

While using your CME you control your medication details all at one time. If your CME does not have this ability, then consider using a program like [Medication Manager](#) or [MediManager](#).

Independent Pharmacies

Many independent pharmacies participate in program training within their Service Market Areas.

Research independent pharmacies in your area.

Independent pharmacies can be an excellent resource for referrals and new clients during CME.

August - September

If you do yearly reviews for other clients, such as life insurance, get all those done so your last quarter is free to concentrate on Medicare.

Visit your pharmacist in August and make sure they have the window signs and bag stuffers to put in everyone's pharmacy bag before September 1

Make sure your pharmacist has your October bag stuffers by the end of September.

If you plan to do any direct mail, you need to schedule it to drop by the middle of September before all the carriers start their marketing.

Brush up on your Medicare knowledge by going through the Medicare Training HQ course.

Set up a Medicare Planner link for your clients to fill out so you can collect their medications and doctors to do a review.

Your planner should ask them for referrals and even give them an incentive to give you referrals.

October - December

Make sure your pharmacist has the November bag stuffed before the end of October.

Send out an email to all your current Medicare clients with a link to your Medicare planner offering to do a review of their current plan.

Remember to make a follow-up call to your clients to see if they need any assistance.

You can also make a list of people to call and make sure you are calling them all.

Make sure you are up to date on your own Medicare plan.

Make sure you are up to date on your own Medicare plan and your own health insurance.

Make sure you are up to date on your own Medicare plan.

See as many people as you can during 2019. Make sure to use technology to be as efficient as possible.

Check carrier websites after December 1st to be sure there are no outstanding requirements on enrolled clients.



Medicare **Achievement Planner**

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