

# ARE YOU READY TO HIT YOUR ENROLLMENT GOALS DURING 2018 AEP?

FIND OUT WITH THIS CHECKLIST

As a Medicare plan marketer, you are no doubt already deep into your AEP planning and syncing process. We've put together this core set of Medicare Marketer tasks that you should have in place to hit your AEP goals. Take a look and see how our list compares to yours. Hopefully this simple assessment will give you a good sense of how you're doing and help you make sure you aren't letting anything slide. Good luck with AEP, and if you feel like you'd like some extra help meeting your goals, give us a call.

## PREPARATION

- You've done your product development homework and have competitive selling points by market, by plan type.
- You've done the research needed to know the top drivers of your audiences in each of market, and have that factored into your primary message points across all channels.
- You have planned a process of socializing all marketing materials with lead Sales personnel for input and refinement.
- You have scheduled the needed production time for compliance sign offs on all creative materials.
- You have reviewed the messaging and architecture on your webpages to ensure the communications are clear and the user experience is one that is positive and response-driven.
- All pages on your website and related docs posted online are 508 compliant.
- You have your data pull models ready for mailing lists.
- You have sales and broker tool kits with a "just in time" fulfillment process.
- You have inventory planned for enrollment kits and related materials for each market.
- All your presentation materials for sales and education seminars are on track to be ready on October 15, along with related speaker room reservations.
- You have looked at how to leverage alternate languages in ethnically diverse markets.
- Customer service personnel (non-sales) are trained and ready on marketing messages as well as a seamless transfer protocol to a licensed sales agent.
- You have looked at lessons learned from previous years to confirm you have addressed all former gaps, as well as baked in what has worked in the past.
- You have prepared a meeting schedule with cross-functional team leaders to report and discuss progress as well as address any concerns as a "Rapid Response Team" throughout AEP.
- You have clearly defined what success is for your AEP.

## EXECUTION

- You have an integrated direct marketing program that reaches your audiences across multiple marketing channels.
- You have outreach programs targeting both prospective and current members
- Direct mail is a major portion of your marketing campaign.
- You have tests and alternative marketing materials loaded in the pipeline with the goal of increasing leads and driving down your cost per enrollment.
- You have DRTV spots in alternate lengths, planned to run in varying day parts to test and extend your media buy.
- You have a robust, multi-touch lead nurture program.
- You have printed plan comparison charts as well as online provider and formulary look up tools that make it is easy for consumers to, "at a glance," understand what they are getting for their money.
- You have Medicare Sales, Educational and Grass root events in the mix.
- You have tracking mechanisms in place that will gauge effectiveness of all marketing tactics.
- You have a dashboard in place that will provide metrics on key performance indicators that you can track throughout AEP.

WANT TO TALK MORE ABOUT YOUR AEP READINESS?

Call 818-703-8775 for a free, no obligation consultation.

