AEP REFLECTION

What Did You Do Well?

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

You 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 for 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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AEP REFLECTION

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 positive for some and 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

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