

# ARE YOU READY TO HIT YOUR ENROLLMENT GOALS FOR THE NEXT AEP?

**FIND OUT WITH THIS  
AEP READINESS  
ASSESSMENT CHECKLIST.**

## **WANT TO TALK MORE ABOUT YOUR AEP READINESS?**

Contact Elliott Dennis at **312-404-4807**  
or **edennis@kernagency.com** for a free,  
no-obligation consultation.

As a Medicare marketer, no doubt you're already deep into your AEP planning and creative development process. We've put together this handy set of Medicare marketing tasks that can help you 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 make sure you're covering all your bases. If you'd like some extra help meeting your goals, please give us a call.



# AEP READINESS ASSESSMENT CHECKLIST

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| <input type="checkbox"/> Received your sales goals and have mapped out what percent each channel will need to contribute.   | <input type="checkbox"/> Received commitments from your broker channel on what they can deliver for the season.  |
| <input type="checkbox"/> You have a clear definition of what a successful AEP means for your brand.   | <input type="checkbox"/> You have inventory planned for enrollment kits and related materials for each market.   |
| <input type="checkbox"/> You have profiled your current membership to better understand who is your real customer.  | <input type="checkbox"/> All your presentation materials for sales and education seminars are on track to be ready in September for broker and sales trainings.  |
| <input type="checkbox"/> You've done your product development homework, and you have competitive selling points by market and plan type.  | <input type="checkbox"/> You have plans for both virtual and in-person seminars to help your audience get the information they need safely and conveniently.   |
| <input type="checkbox"/> All of your materials and your website are highly readable and ADA compliant.  | <input type="checkbox"/> You've reviewed how to leverage alternate languages in ethnically diverse markets.  |
| <input type="checkbox"/> You've done the research to understand how your audience has evolved since COVID-19 and what they're now looking for in a Medicare plan.                                 | <input type="checkbox"/> Also, you tested your end-to-end customer/member experience in-language.  |
| <input type="checkbox"/> Built a competitive benefits chart. Benefits are posted on Medicare.gov or once benefits are released to the sales channels.   | <input type="checkbox"/> Customer Service personnel (non-sales) are trained and ready on marketing messages as well as on seamless transfer protocol to a licensed sales agent.                          |
| <input type="checkbox"/> You planned a process for socializing all marketing materials with key sales personnel for input and refinement.   | <input type="checkbox"/> You've reviewed lessons learned from previous years to confirm you've addressed all former gaps as well as incorporated what has worked in the past.                            |
| <input type="checkbox"/> You scheduled the needed production time for compliance sign-offs on all creative materials.   | <input type="checkbox"/> You've 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. |
| <input type="checkbox"/> You reviewed the messaging and architecture on your web pages to ensure the communications are clear and the user experience is one that's positive and response-driven. | <input type="checkbox"/> You've outlined how you will onboard and retain your newest members once they've enrolled.  |
| <input type="checkbox"/> You have propensity models in place so you'll hit the right targeted audience.   |  |

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**KERNHEALTH**  
AN OMNICOM AGENCY

## AEP READINESS ASSESSMENT CHECKLIST (CONTINUED)

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| <input type="checkbox"/> You've developed an omnichannel marketing program that reaches your target audiences across multiple media channels.                                 | <input type="checkbox"/> You have DRTV spots in alternative lengths, planned to run in varying dayparts to test and extend your media buy.  |
| <input type="checkbox"/> You have post-ANOC retention communication and outreach planned for at-risk members.   | <input type="checkbox"/> You have a robust, multitouch, lead-nurture program that's programmed into your CRM tool for ease of deployment.   |
| <input type="checkbox"/> You've tested virtual sales events, seminars and grassroots events to make sure they run smoothly.   | <input type="checkbox"/> You have printed plan/benefits charts, as well as online provider and formulary lookup tools, that make it easy for consumers to understand at a glance what they are getting for their money. |
| <input type="checkbox"/> You have outreach programs targeting prospective, winback and current members.   | <input type="checkbox"/> You have tracking mechanisms in place that will gauge the effectiveness of all marketing tactics.  |
| <input type="checkbox"/> While direct mail is still a major workhorse, you should have digital and social media factored into your media mix.                                 | <input type="checkbox"/> You have the ability to be agile/response-based on what's working and what's not, and can make adjustments as needed.  |
| <input type="checkbox"/> You have tests and alternative marketing materials loaded in the pipeline with the goal of increasing leads and driving down the cost of enrollment. | <input type="checkbox"/> You have a dashboard in place that will provide metrics on key performance indicators, which you can track throughout AEP.   |

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