

## **ARE YOU READY TO HIT YOUR ENROLLMENT GOALS DURING 2021 AEP?**

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

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

Contact Tim Hinds at **818-444-4208**  
or **thinds@kernagency.com** for a free,  
no-obligation consultation.

As a Medicare marketer, you're no doubt already deep into your AEP planning and creative development process. We've put together this handy set of Medicare marketing tasks that could help you hit your AEP goals during these unprecedented times. 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 are covering all your bases. Good luck with AEP, and if you'd like some extra help meeting your goals, please give us a call.



# PREPARATION

---

- You have a clear definition of what a successful AEP means for your brand.
- You have inventory planned for enrollment kits and related materials for each market.
- You've done your product development homework, and you have competitive selling points by market and by plan type.
- All your presentation materials for sales and education seminars are on track to be ready on October 15.
- All of your materials and website are highly readable and ADA compliant.
- You have plans for virtual seminars to help your audience get the information they need safely and conveniently.
- 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. And you've factored this into your primary message points across all channels.
- You've reviewed how to leverage alternate languages in ethnically diverse markets.
- You planned a process for socializing all marketing materials with key sales personnel for input and refinement.
- Customer Service personnel (non-sales) are trained and ready on marketing messages, as well as on seamless transfer protocol to a licensed sales agent.
- You scheduled the needed production time for compliance sign-offs on all creative materials.
- 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.
- 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.
- 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.
- You have propensity models in place, so you'll hit the right targeted audience.
- You've outlined how you're going to onboard and retain your newest members once they've enrolled.
- You have sales and broker tool kits with a "just in time" fulfillment process.

## WANT TO TALK MORE ABOUT YOUR AEP READINESS?

Contact Tim Hinds at **818-444-4208** or [thinds@kernagency.com](mailto:thinds@kernagency.com) for a free, no-obligation consultation.

**KERN HEALTH**

# EXECUTION

---

- You've developed an integrated direct response marketing program that reaches your target audiences across multiple media channels.
- You have a robust, multitouch lead-nurture program.
- You've tested virtual sales, seminars and grassroots events to make sure they run smoothly.
- You have printed plan comparison 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.
- You have outreach programs targeting prospective, win-back and current members.
- You have Medicare sales, educational and grassroots virtual events in the mix.
- While direct mail is still a major workhorse, you should have digital and social media factored in, especially with the presidential election looming.
- You have tracking mechanisms in place that will gauge the effectiveness of all marketing tactics.
- You have tests and alternative marketing materials loaded in the pipeline with the goal of increasing leads and driving down the cost of enrollment.
- You have the ability to be agile/response-based on what's working and what's not, and can make adjustments as needed.
- You have DRTV spots in alternative lengths, planned to run in varying dayparts to test and extend your media buy.
- You have a dashboard in place that will provide metrics on key performance indicators, which you can track throughout AEP.
- You've taken this year's presidential election advertising impact into account in your overall media planning.

## WANT TO TALK MORE ABOUT YOUR AEP READINESS?

Contact Tim Hinds at **818-444-4208** or [thinds@kernagency.com](mailto:thinds@kernagency.com) for a free, no-obligation consultation.

**KERN HEALTH**