

ARE YOU READY TO HIT YOUR ENROLLMENT GOALS DURING AEP 2023?

**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 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

- Received your sales goals and have mapped out what percent each channel will need to contribute.
- You have a clear definition of what a successful AEP means for your brand.
- You have profiled your current membership to better understand who is your real customer.
- You've done your product development homework, and you have competitive selling points by market and by plan type.
- All of your materials and your website are highly readable and ADA compliant.
- 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.
- Build a competitive benefits chart once 2023 benefits are posted on Medicare.gov or once benefits are released to the sales channels.
- You planned a process for socializing all marketing materials with key sales personnel for input and refinement.
- You scheduled the needed production time for compliance sign-offs on all creative materials.
- 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 have propensity models in place, so you'll hit the right targeted audience.
- Received commitments from your broker channel on what they can deliver for the season.
- 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 in September for broker and sales trainings.
- You have plans for both virtual and in-person seminars to help your audience get the information they need safely and conveniently.
- You've reviewed how to leverage alternate languages in ethnically diverse markets.
- Also, test your end-to-end customer/member experience in language.
- 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'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'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've outlined how you will to onboard and retain your newest members once they've enrolled.

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AEP EXECUTION

- You've developed an omnichannel marketing program that reaches your target audiences across multiple media channels.
- You have DRTV spots in alternative lengths, planned to run in varying dayparts to test and extend your media buy.
- You have post-ANOC retention communication and outreach planned for at-risk members.
- You have a robust, multitouch, lead-nurture program that's programmed into your CRM tool for ease of deployment.
- You've tested virtual sales events, seminars and grassroots events to make sure they run smoothly.
- 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.
- You have outreach programs targeting prospective, winback and current members.
- You have tracking mechanisms in place that will gauge the effectiveness of all marketing tactics.
- While direct mail is still a major workhorse, you should have digital and social media factored, into your media mix.
- 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 tests and alternative marketing materials loaded in the pipeline with the goal of increasing leads and driving down the cost of enrollment.
- You have a dashboard in place that will provide metrics on key performance indicators, which you can track throughout AEP.

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AN OMNICOM AGENCY