



Visitor Overview

# Post-AEP Survey Report 2017

Senior Marketing Specialists  
(800) 689-2800  
[SMSteam.net](http://SMSteam.net)

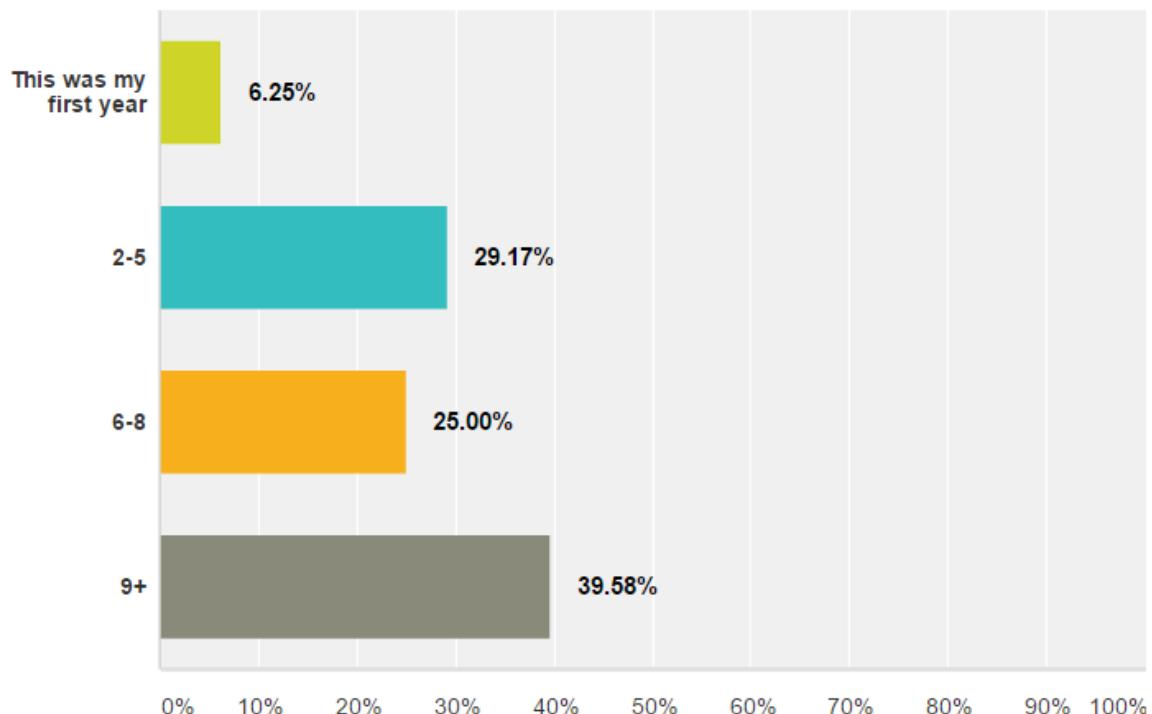
Thank you to all the agents who participated in the 2017 Post-AEP survey. We appreciate your continued support and look forward to working with you in 2017 and beyond.

We have assembled all the data from the 6 question survey and are proud to share the results with you.

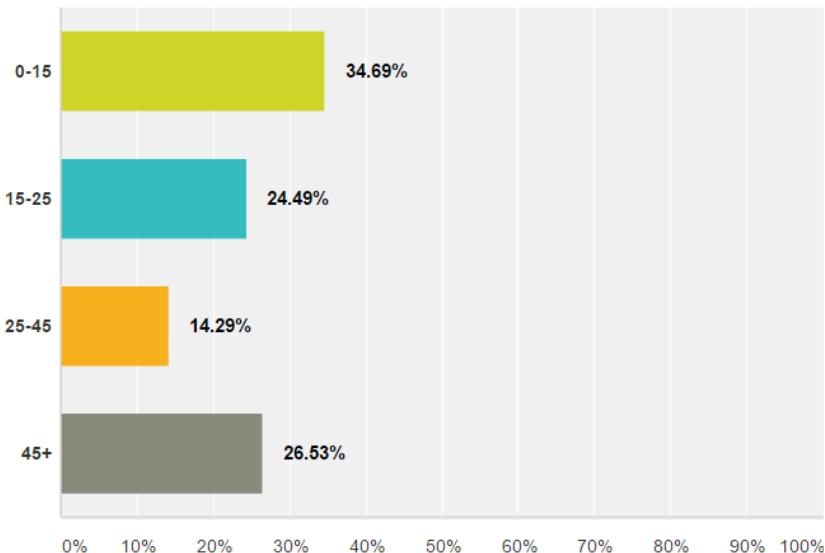
If you have any questions or comments, please reach out to us!

And now for the results:

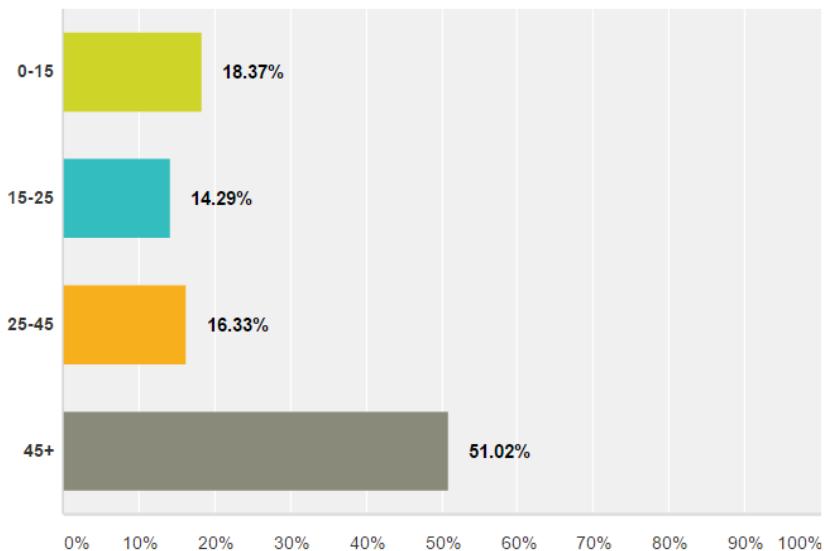
## Q1: How many AEP's have you been a part of?



## Q2: How many new clients did you obtain this AEP?

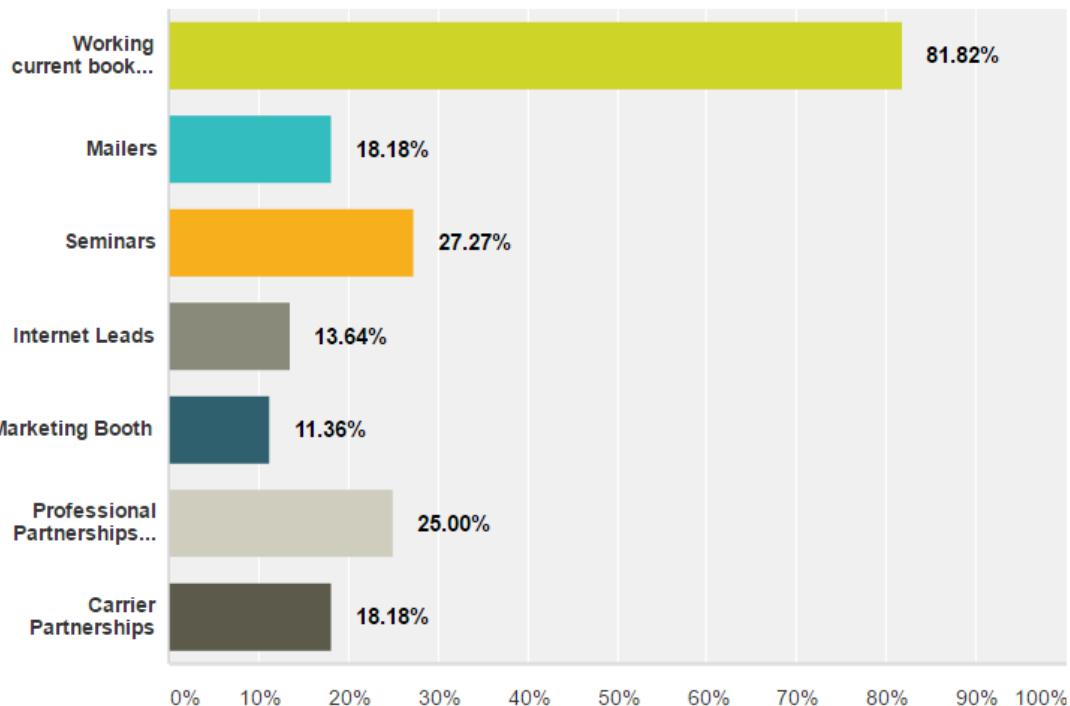


## Q3: How many total policies did you write this AEP including current clients??



As you can see from the numbers, most agents added a few clients, but helped their current book of business with new plans.

## Q4: What marketing methods worked for you this AEP? (Multiple answers allowed)



### **Additional Comments (duplicate / similar comments were omitted):**

Referrals

Newspaper ads / theater ads

Live transfer leads

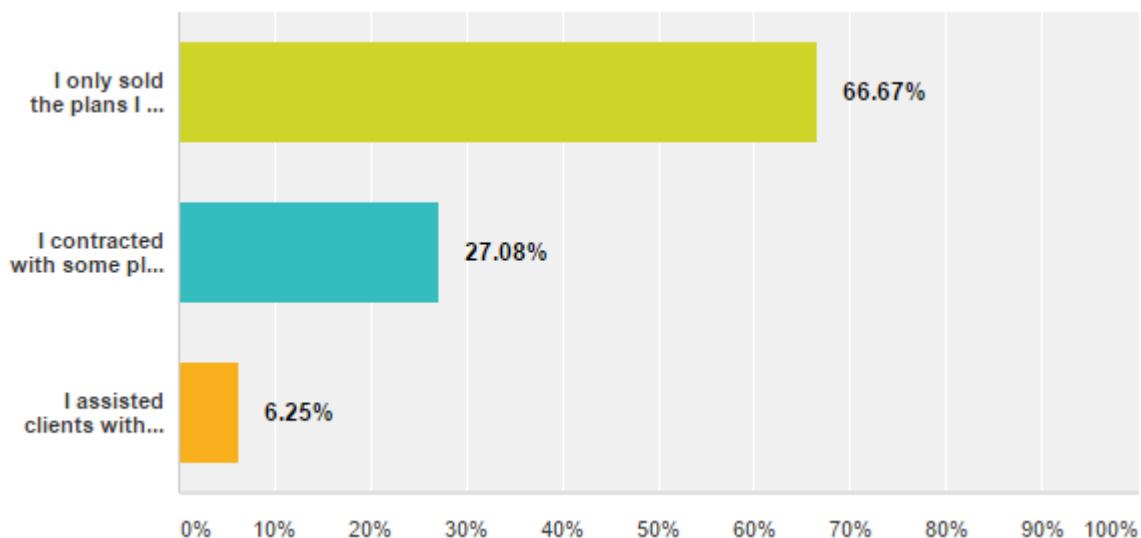
Outreach coordinator generating referrals from medical professionals

As you can see, the vast majority worked their current book of business this AEP. This was in most part to keep your clients, your clients and prevent them from going to a different agent.

The other two most common marketing methods were seminars and professional partnerships.

**If you are looking for new ways to work your book of business, perform more seminars, or if you are wanting to add more professional partnerships in 2017, contact us!**

## Q5: Did you sell PDP plans?



66.67% - I only sold the plans I am contracted with

27.08% - I contracted with some plans and enrolled others thought Medicare .gov

6.25% - I assisted clients with Medicare.gov and did not sell PDPs

In many markets, there tends to a be a few plans that will stand out from the rest. As you can see, most of the agents (almost 94%) contract and sell PDP plans.

With prescription drugs being one of the top concerns among seniors, it makes sense as an insurance professional to have Part D plans available to your clients.

## Q6: What are your Post-AEP plans?

This was a free comment section. Duplicate / similar comments were omitted

- continuing to serve my existing clients - reviewing current Med sup plans for price improvements, & additional products.
- try working the employer market
- Change the game
- Work on the turning 65 group
- Reach out to new enrollees by end of Jan, then again in March, then again in June.
- Winter in Florida
- Leave the country.....headed to Aruba!
- Begin selling Hospital Indemnity plans or other ancillary products to clientele to stay in contact.
- Develop a marketing program targeting new to Medicare age ins, also to target 66-67 year old for Med Sup. Would also like to target Med Sup during Medicare Advantage Disenrollment period.
- Work on developing more carrier partnerships as well as better internet marketing and other marketing methods
- SEP and Med Sup.
- play golf
- ACA wrap-up, work on becoming a knowledge source for ACA change over to other brokers and tax preparers
- cross sell ancillary products to our new clients. Market for turning 65s.
- Try to keep up to date with the rules and regulations
- FILE! take a breather, then work leads for Lock-in
- Still have 15 more writing appointments on the books for age-ins. From there the focus is 2 fold. Final Expense/Legacy Safeguard and recruiting 6 more agents in 2017. Of course we will provide world class service to our clients so those referrals keep coming in.
- Rock the age-ins!

## Q6: What are your Post-AEP plans? (cont.)

- Follow up with clients to find other insurance needs.
- To get more knowledge
- staying in contact with clients and try to sell more life business
- Doing seminars and taking ads out in the newspaper.
- total review. We did well and the praise goes to the staff who were real troopers. As is usual we had areas we did not do well and next year we will be ahead (sounds like locker room halftime talk).
- finish writing 1/1 and 2/1 ICEPs and SEPs
- Bookkeeping. Research other products to sell with real value.
- Sell indemnity and final expense
- mailers ancillary
- Finishing up ACA AEP, resetting goals, going forward with the growth of our business and continue education of our staff

### Post AEP Ideas:

- Continue working the T65 market – there are always people aging into Medicare
- Keep in touch with your current clients
- Pick up ancillary products for your clients and prospects
- Make sure you are keeping your files and CRM up to date
- Keep in the know with compliance and marketing techniques

Senior Marketing Specialists can help with all this and more!

# Senior Marketing Specialists Resources:



## Agent Marketing Portfolio

Marketing materials can be the most difficult thing for an independent agent to produce. Quality marketing pieces can be even trickier to come across. That's why Senior Marketing Specialists has developed a portfolio of quality, customizable marketing pieces, for access to all direct agents to utilize.

[CLICK HERE TO ACCESS](#)



## Quote Engine

Find quotes and much more with our industry leading quote engine!

- Monthly rate change report (exclusive to SMS)
- Hospital Indemnity Coverage
- Underwriting questions
- Household Discounts
- Print / Email Personalized Quotes
- And More

[CLICK HERE TO ACCESS](#)



## Join us at the Medicare Café!

Every Tuesday at 10am (CST) for various topics and conversation!

[More Details Here](#)

# Partnering

# Here's to a great 2017!

Senior Marketing Specialists can:

- Provide additional training and educational opportunities
- Contract you with the most competitive carriers
- Support you and your office staff
- Create marketing plans
- And more...



*When it matters most, you need a specialist*

<http://www.smsteam.net/>

(800) 689-2800