2025 AEP REFLECTION

WHAT DID YOU DO WELL?

AEP can be a very busy and challenging time for a lot of people.

Now that you have successfully made it through, it's time to take a moment to celebrate your accomplishments and reflect on the lessons you've gained. With this newfound understanding, you can implement it in the upcoming year!

? How many enrollments did you complete this year?

? What worked well in getting enrollments?
Did you switch up your presentation or use any 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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WHERE CAN YOU IMPROVE?

Even if you had a great AEP, it's important to look at any weak points.

Use the questions below to identify your areas of improvement, so you can set yourself up for an even more successful AEP next year.

Leads can be a positive for some and a 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 overall?

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