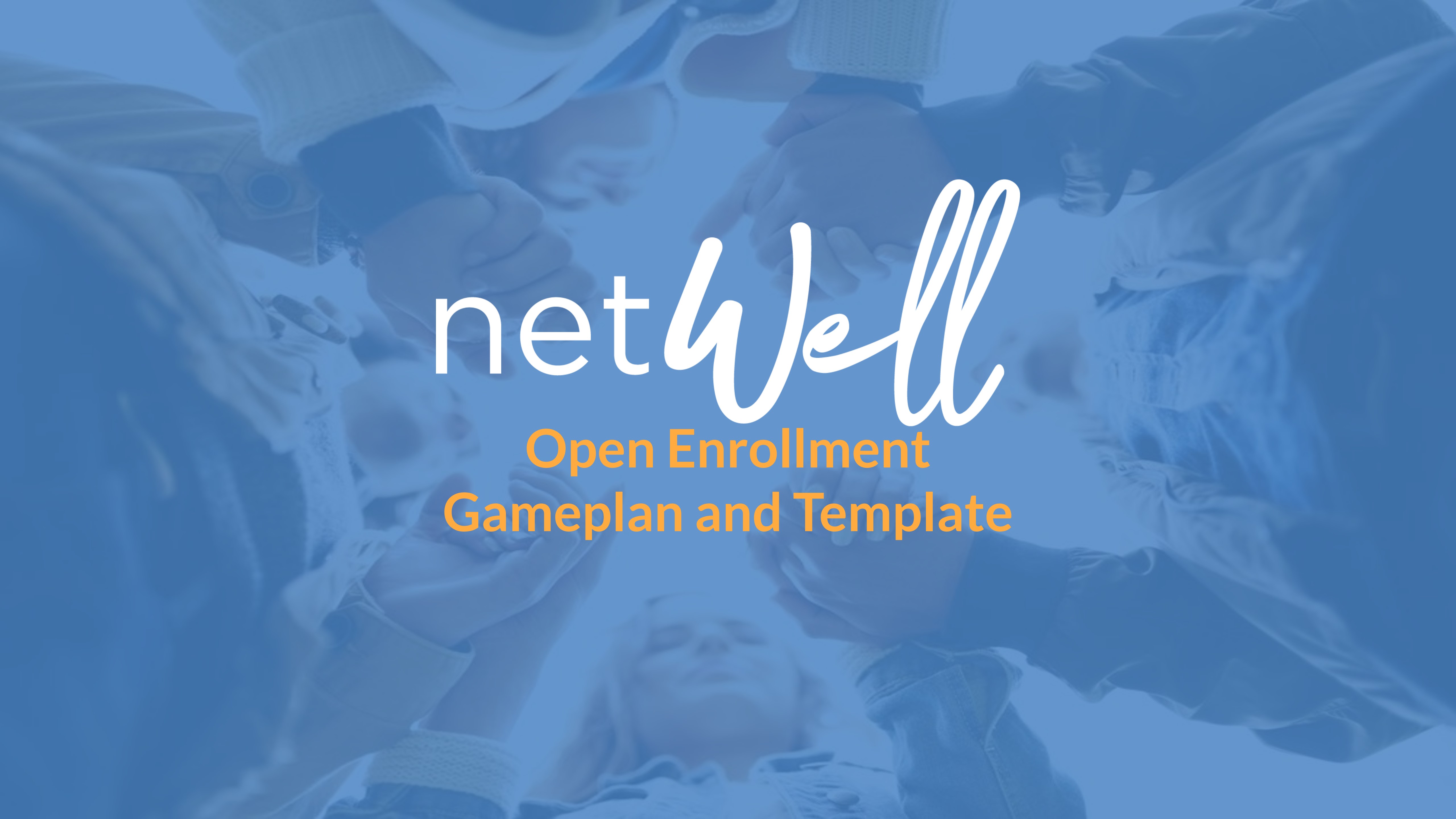

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Open Enrollment Gameplan and Template

As an active health insurance agent, you're well aware that the upcoming OEP is the time to shine! OEP (**Open Enrollment Period**) kick-off is just days away. Don't get caught off guard .

This support guide is designed to give you practical steps to make the most of the OEP. Whether you're just getting started or you've been in the business for years, having a solid strategy in place can make all the difference. Let's get your action plan ready and set you up for success!

"Prepare your work outside, get everything ready for yourself in the field; and after that build your house."
— *Proverbs 24:27*

Duck Alignment:

Getting Ready for the OEP

Before November rolls around, it's time to round up the necessary information, documents, and data you'll need to hit the ground running. So, let's start by making sure "all your ducks are in a row."

Healthcare Plans & Options

What plans will you spotlight this season?
Start by gathering all the documents and marketing materials for each option you plan to focus on during OEP. As you pull these together, keep these key questions in mind.

Do I have at least two solid options for each client scenario? For example, a single mother with kids may need more comprehensive coverage, while a young freelancer might lean toward a catastrophic plan.

Min. 2 Plan Options

Are my offerings setting up paths to other services? Think beyond basic coverage: could a healthcare membership easily link to a dental plan, or perhaps open the door to other financial services?

Ancillary Services

Let's get these pieces organized now so you'll be ready to make a big impact!

The Basics: info you need to keep handy

Clients:
Know Your People

Keeping track of your clients' histories and staying connected is key to building long-term relationships. To offer the right solutions, you'll need more than just their health details—you want to know their goals and life events too. *Are they planning to start a family? Launch a new business? Maybe they're looking to buy their first home?* Take notes and have those notes prepared for future contact. It's a real game changer when you can recall a life goal 6 months later by asking, "How's the new addition to the family?"

Full contact information

(Seems obvious? Yet, many agents are missing things like client office contact info, emergency contacts, etc)

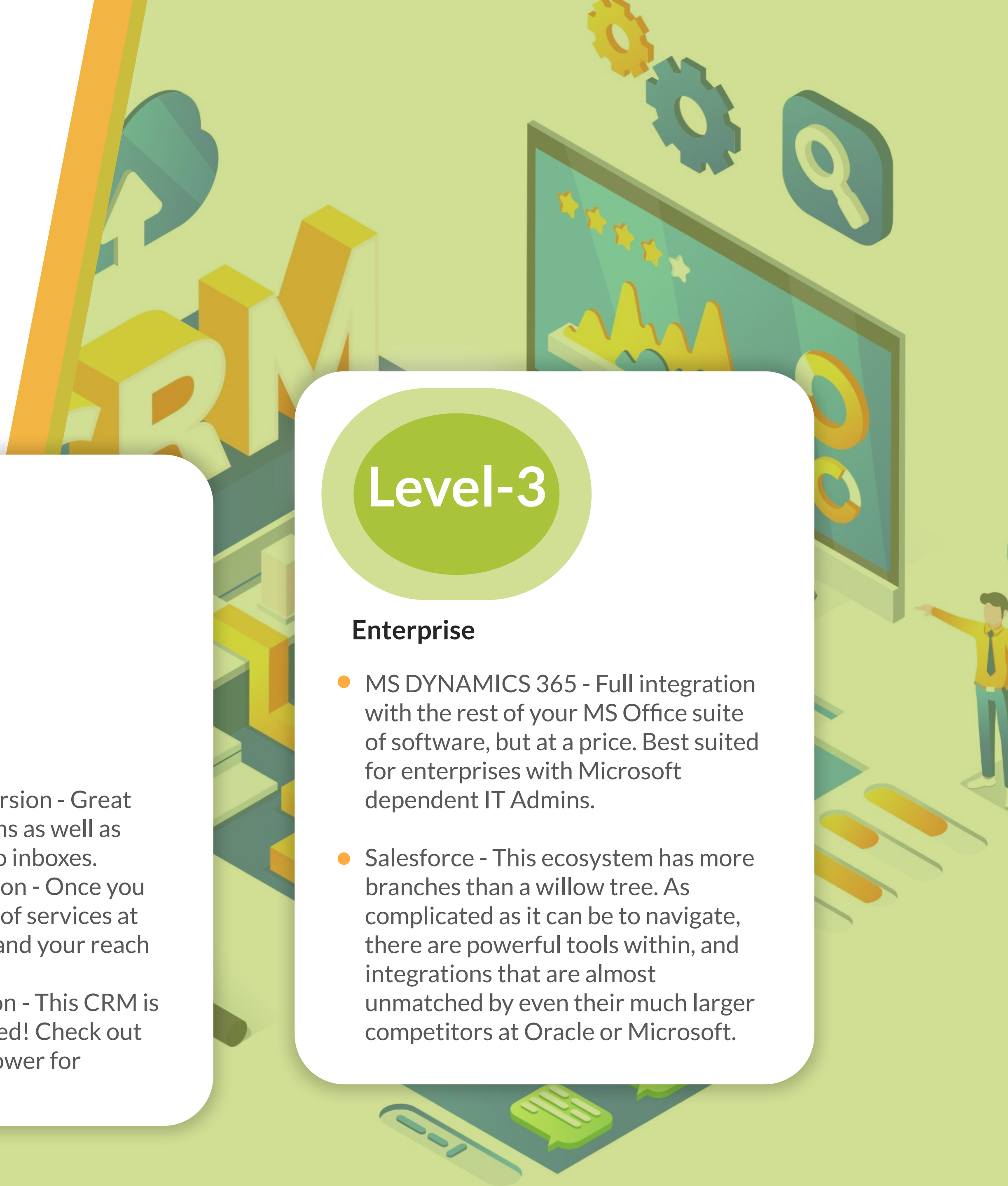
Health conditions that could impact coverage options

History of plans and programs chosen

Beneficiaries and their contact information

Customer Relationship Management: CRMs

But how do you track all of that while staying on top of key events (and reasons to reach out)? That's where a good CRM (Customer Relationship Management) tool comes in! If you're not already using one, no worries—stay tuned to our agent newsletters where we'll break down the best CRMs for different budgets and needs, from affordable options to the powerful Salesforce ecosystem. Look for these options, if you're still shopping CRMs.



Level-1

Pro, but Entry Level

- HUBSPOT - Free version
  Perfect for getting your feet wet, and your contacts in order.
- ZOHO - Free version
  Perfect for small teams of 3.
- FRESHSALES - Free version
  Great for integrating AI tools.

Level-2

Not Free, but Robust

- MAILCHIMP - Paid Version - Great tools for drip campaigns as well as dependable delivery to inboxes.
- HUBSPOT - Paid Version - Once you open up the next level of services at Hubspot, your power and your reach grow!
- Pipedrive - Paid Version - This CRM is sales driven and focused! Check out the demo to see the power for yourself

Level-3

Enterprise

- MS DYNAMICS 365 - Full integration with the rest of your MS Office suite of software, but at a price. Best suited for enterprises with Microsoft dependent IT Admins.
- Salesforce - This ecosystem has more branches than a willow tree. As complicated as it can be to navigate, there are powerful tools within, and integrations that are almost unmatched by even their much larger competitors at Oracle or Microsoft.

Next Steps:
Taking Your Plan into the Real World

With your ingredients in hand and your information organized — now it's time to put it all to work for you! This is where marketing comes into play. It's a vast topic, filled with more tangents than a calculus exam. We're going to stick to the high-level strategies for now and save the deep dives for future conversations and your own research. The goal here is to give you a solid foundation to build on.

We'll break this down into two categories:

- ➢ Strategies for established agents looking to mine existing clients.
- ➢ Tips for both new and seasoned agents looking to expand their reach.

(Established Agents)

Mining Existing Clients

As an established agent, you likely have solid relationships with your clients. Whether you're using a CRM, a spreadsheet, or even an old-school little black book, hopefully you've kept up with contacting your client base at least twice a year— and that's in person or over the phone! Ideally, you've also supplemented that with regular emails & direct mail.

This is the time of year to reconnect—not the week before holiday chaos hits. This outreach is your opportunity to remind clients that OEP is now. You might be surprised to find that most of them only vaguely understand what Open Enrollment means. This is your chance to step in and show them how you can potentially save them thousands of dollars on healthcare costs. And here's the best part: it costs them nothing to listen!

Has anything changed in their life that would impact their coverage needs?

Are they happy with their current plan?

Are they aware of other options you could provide?

When you reach out, think beyond just the sale. Take a moment to check in and ask about those life events!

These conversations build trust and make your clients more likely to turn to you when they're ready to make changes. Being prepared with the materials we mentioned earlier means you'll be the expert in the room, the person with all the answers.

(For Everyone)

Social Media & Digital Marketing

Whether you’re a brand-new agent or a seasoned pro, a strong online presence can make a huge difference. Here are some tips to get the most out of your efforts:

1

Be a Resource, Not Just a Sales Pitch:

Your posts should add value, not just push products. Share insights, tips, and relevant news that will engage your audience and position you as a helpful resource.

2

Get the Word Out:

Ask your friends and family to share your content. This isn’t just about reaching more people—it also signals to social media algorithms that your content is worth boosting. A little nudge from your network can give your posts a natural leg up.

3

Leverage the Power of Video:

Right now, video content—especially short clips—rules social media. Whether it’s a quick tip, a client testimonial, or a myth-busting video about insurance, video can help grab attention and drive engagement.

4

Get Reviews Everywhere!

Don’t limit yourself to one platform. Ask for reviews on Google, Meta (Facebook), Yelp, and anywhere else your clients might look for information. And don’t be shy—sometimes a simple, “If I’ve helped you today, would you mind leaving a quick review on Platform X?” can go a long way.

Email Marketing

- ★ If you're just getting started, hopefully you're connected with an organization that shares leads and helps with a little self-promotion. If not, your first step should be to invest in lead generation through social media marketing. This means running ad campaigns targeted specifically at people who are "in market" and open to sharing their contact information with agents. Ad agencies can be a big help in this arena, so consider the value of your own time against contracting with someone to get the ball rolling on lead generation.

- ★ For those who already have a client base or a list to reach out to, remember: effective email marketing is about more than just sending a pitch. You might think bombarding someone's inbox weekly is the way to stay at the top of their mind, but research shows that in this industry, twice a month is the sweet spot.

- ★ So, what should you be sending? The goal is to spark engagement and build relationships. Start by giving your contacts a friendly reminder that the OEP is here and that now is the perfect time to compare plans and explore options. Use a strong Call to Action (CTA) with a sense of urgency—the deadline is real, after all!

While you can purchase a list of emails from those that sell contacts, it's been found that these purchased lists are ineffective and mostly low quality leads.

- ➢ Let's also consider sending content they can really use! While this can still be relevant to your services, don't pass up the chance to send along helpful stories and information that make it a pleasant surprise each time you show up in someone's inbox.

Direct Mail

Yes, direct mail is still a thing!

Even in the digital age, a well-timed postcard or letter can have a big impact. While email to a specific curated list can be more personal, direct mail has the power of reach. With today's technology, it's easier than ever to visit a direct mail website to set up a campaign. In less than an hour, you can choose a template, drop in your content, and have your message printed, labeled, and mailed to a targeted list.

Imagine getting into thousands of mailboxes within a few days—all without leaving your desk!

Community Events

Fall festivals, local art shows, and neighborhood events are fantastic places to connect. Don’t skip out on community involvement—showing up and being present is a tried-and-true way to meet people and introduce your services. Financial advisors have been using this approach for decades to establish themselves locally, and it’s still one of the most authentic ways to build trust and name recognition.

With these strategies in hand, you're well on your way to making the most out of this OEP season. Preparation is key, so study up on your offerings to be prepared for questions and opportunities. Know your clients, know your products, and know your business!

Stay tuned for more tips and tricks to come—let's make this your best year yet!

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