

Here's what serious Medicare agents should have ready by Q3



Certification & Contracting

- ☐ AHIP certification
- ☐ Complete all carrier certifications and trainings
- ☐ Updated W-9 and E&O insurance documents
- ☐ Contact LeClair to review portfolio



Quoting & Enrollment Tools

- ☐ Connecture access (with training completed)
- ☐ Enrollment platforms tested and bookmarked
- ☐ Backup paper apps or PDFs downloaded
- ☐ Scope of Appointment (SOA) storage system (paper or digital)



Marketing & Outreach

- ☐ CMS-compliant postcards, email templates, and call scripts
- ☐ LeClair's client communications toolkit
- ☐ Updated phone message, email signature, and web presence
- ☐ Branded folders or presentation materials for in-person appointments



CRM & Tech Stack

- ☐ A CRM that tracks SOAs, plan selections, appointments, and follow-ups
- ☐ Calendar system for auto-reminders and lead rotation
- ☐ Secure digital document storage and e-signature tools (e.g., DocuSign)



Training & Support

- ☐ Monthly LeClair training calendar (live and on demand)
- ☐ CMS marketing and fraud prevention guidelines
- ☐ Recorded webinars on compliance, marketing and client strategy
- ☐ Quick-reference carrier contact sheet



Agent Well-Being & Resilience

- ☐ Personal time blocked weekly (yes, really)
- ☐ System for weekly reflection: wins, setbacks, goals
- ☐ Peer check-in group or accountability partner
- ☐ AEP day-starter checklist to stay focused and calm

RESOURCE

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