LeClair

# The Ultimate Agent Resource Checklist for AEP

*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

## 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)

## 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)

## Training & Support

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

## 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

## 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

## Contact

Sarah Korsch
sarah.korsch@leclairgroup.com
651-705-7269