

# AGENT GOAL SETTING GUIDE



## Goal setting for AEP and year round

As you decide how to approach AEP season, your first order of business is to take a moment to reflect on last year, then decide how you'd like things to go this year in comparison. We've put together a few questions to help you set your goals.

### 1. How was your last AEP?

Whether you have detailed metrics or just a sense of your sales during the last AEP, now's the time to bring that back into your awareness and make some choices. Questions to consider:

- What worked well for getting enrollments?
- Where did your best leads come from?
- Were your sales mostly new clients, existing clients, or a mix?
- Did you sell at a level that met your existing goals?
- Was there anything you would do differently if you could do it again?

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## 2. What are your growth goals?

Take time to consider what you want from this AEP to grow your business. Even better, write them down; research has shown that you are 42% more likely to achieve your goals if they are written down. Here are ideas to get you started:

- Decide the general focus of your goals. Maybe you want to have more clients, recruit more agents or increase your income. Each of these goals takes a different focus.
- Get more specific with your steps. If you want to grow your clients:
  - o Sketch out some goal numbers for new clients.
  - o Make some time commitment calculations: How many appointments will you need to enroll your desired number of new clients? How long will each appointment take?
  - o What are the additional steps you'll need to get the appointments and make the time?
- Alternatively, if you want to recruit more agents:
  - o Decide how many new agents you'd like to recruit.
  - o Plan your recruitment efforts: word-of-mouth, events, referrals and marketing materials.
  - o Make sure your schedule allows for any planned recruitment time.

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## 3. Are there business changes to consider?

With your notes about last year and your new goals in mind, decide now how to make changes to ensure you can meet your goals. Questions to consider:

- How might your lead strategy go better? Should you consider changing lead types (direct mail to data or online to referrals)?
- How can you manage your time better this year? Think about how you spent time last year and how you might streamline some of your workflow.
- Is your portfolio diverse enough for your clients? Could you offer more products?

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**Final Note:** For a bigger-picture look at AEP preparation, download our **AEP Readiness Guide** to plan your AEP efforts for the whole season.