

NEW FROM AGENTMETHODS

GREAT AEP

Make More Sales, Help More Clients, and
Have Less Stress this AEP



CHALLENGES OF AEP

- Time is limited - You only have 53 days
- You need to balance outreach, scheduling, and meeting with customers
- No-shows, cancelations, and rescheduling destroy your efficiency
- You need to stay compliant with CMS



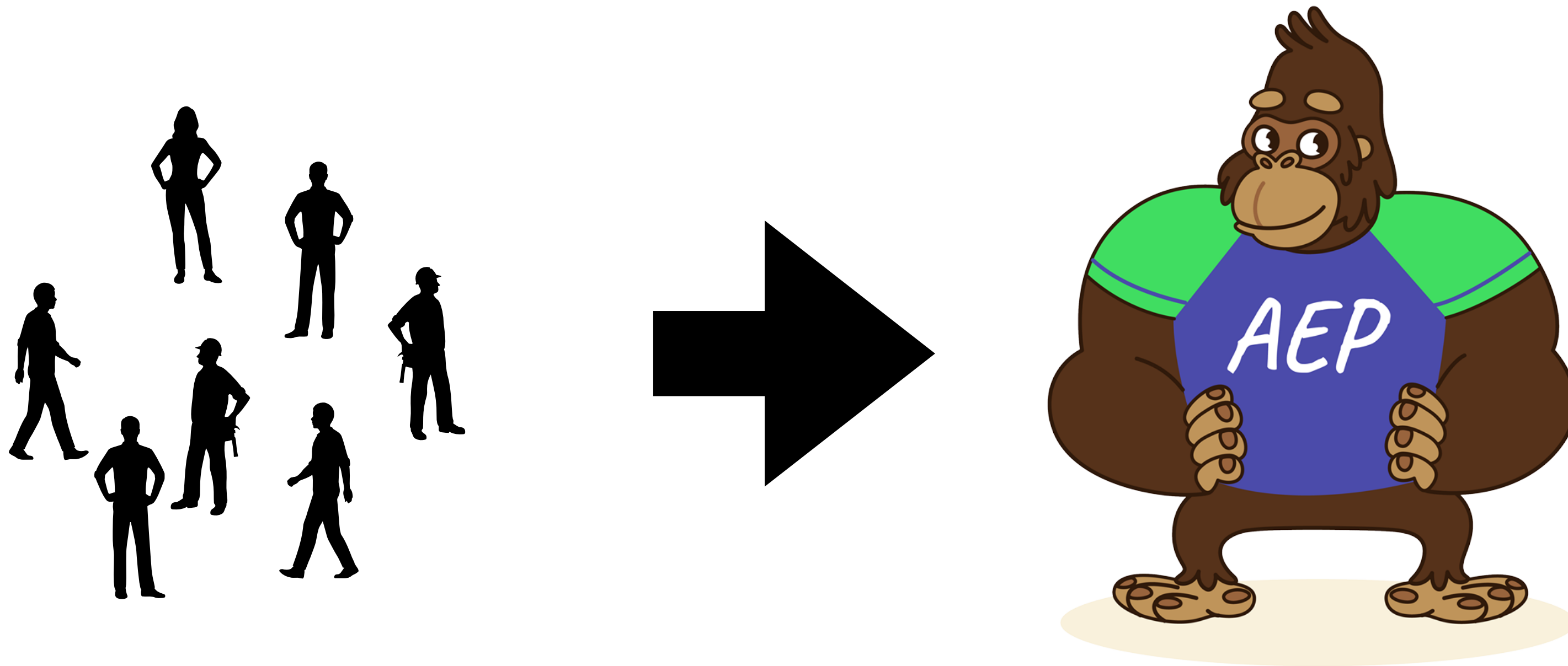
BENEFITS OF GREAT AEP

- **Hands-free outreach and scheduling** so you are free to focus 100% on selling
- **Connect with every customer and prospect** that you want to
- **Optimize your calendar** so there aren't gaps and crunches
- **Automatically capture Scope of Appointment forms**



HOW IT WORKS

1. Load in your contacts (Name, phone, and email)



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HOW IT WORKS

2. We send out a series of emails and SMS messages during AEP inviting them to schedule a meeting with you

- ✓ SMS has a 98% open rate and 90 second response time
- ✓ We take care of opt-out and unsubscribes



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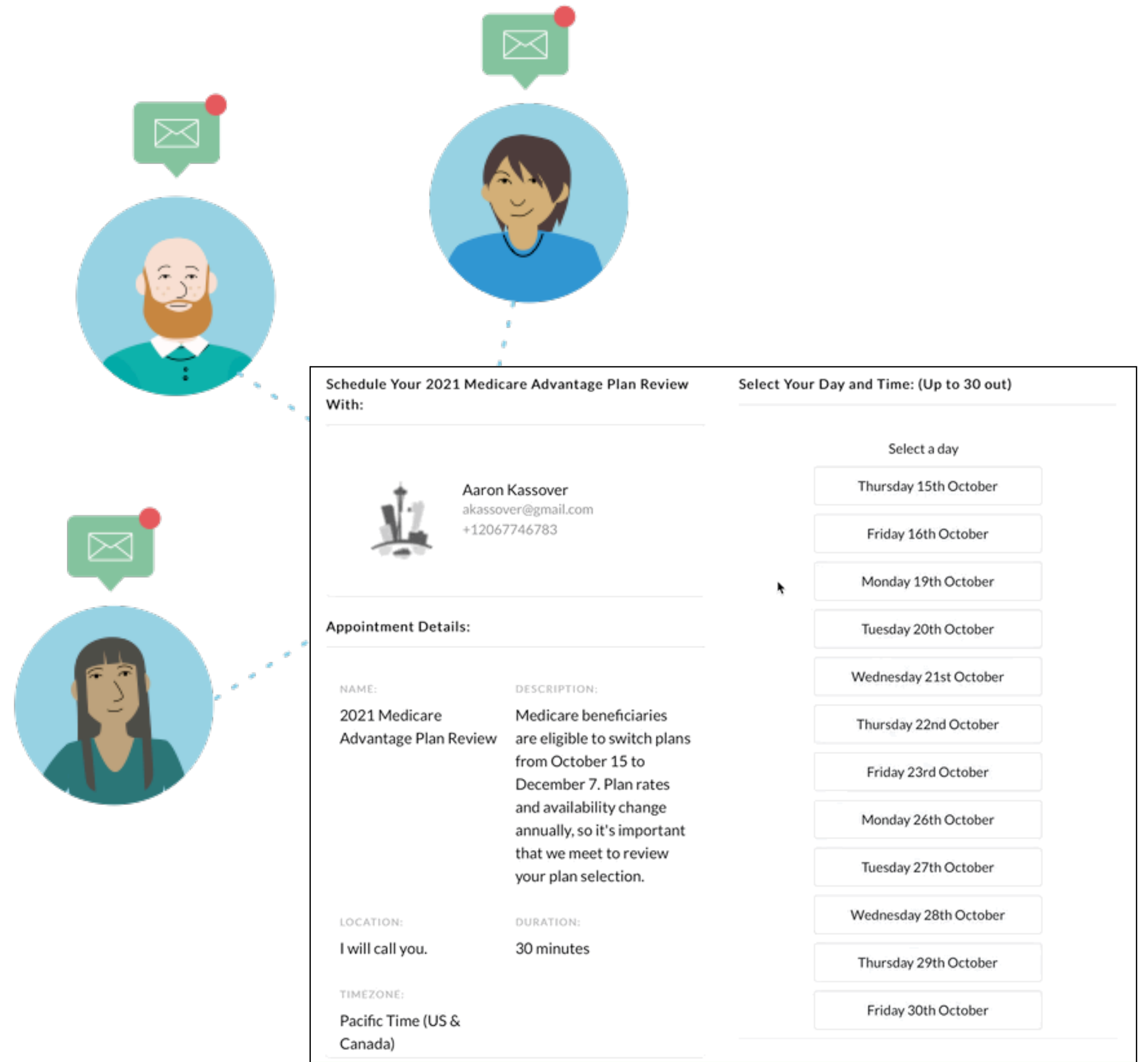


HOW IT WORKS

3. Your clients schedule an appointment with you via a self-service calendar.

✓ No back-and-forth!


✓ Synchs with your calendar



The diagram illustrates the process where clients schedule appointments. Three client avatars (a man with a beard, a woman, and another woman) are shown with email icons above them. Dotted lines connect these avatars to a central self-service calendar interface.

Schedule Your 2021 Medicare Advantage Plan Review

With:

 **Aaron Kassover**
akassover@gmail.com
+12067746783

Appointment Details:

NAME:	DESCRIPTION:
2021 Medicare Advantage Plan Review	Medicare beneficiaries are eligible to switch plans from October 15 to December 7. Plan rates and availability change annually, so it's important that we meet to review your plan selection.
LOCATION:	DURATION:
I will call you.	30 minutes
TIMEZONE:	
Pacific Time (US & Canada)	

Select Your Day and Time: (Up to 30 out)

Select a day

- Thursday 15th October
- Friday 16th October
- Monday 19th October
- Tuesday 20th October
- Wednesday 21st October
- Thursday 22nd October
- Friday 23rd October
- Monday 26th October
- Tuesday 27th October
- Wednesday 28th October
- Thursday 29th October
- Friday 30th October

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HOW IT WORKS

4. At the time of scheduling, your clients sign a digital Scope of Appointment

- ✓ Stored with your calendar invite
- ✓ We archive or you download



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HOW IT WORKS

5. Before the appointment, we send out email and SMS reminders

- ✓ Reduce no-shows and cancellations
- ✓ Include additional instructions on what your customer should have ready (RX, drs, etc)
- ✓ If a customer needs to reschedule, we will help them select a new time - no need to call you



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HOW IT WORKS

**6. You focus on what you do best
- helping your clients with
Medicare.**

- ✓ Customers are queued up & your calendar is filled without you lifting a finger
- ✓ No need to hire an assistant to handle scheduling or cobble together a bunch of systems



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SPECIAL AHCP PRICING

Sign up at <https://greataep.com/AHCP>

Up to
200 contacts

~~\$799/year~~
\$399/year*

Up to
500 contacts

~~\$999/year~~
\$499/year*

Up to
1000 contacts

~~\$1199/year~~
\$599/year*

* AHCP Access Price

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