

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

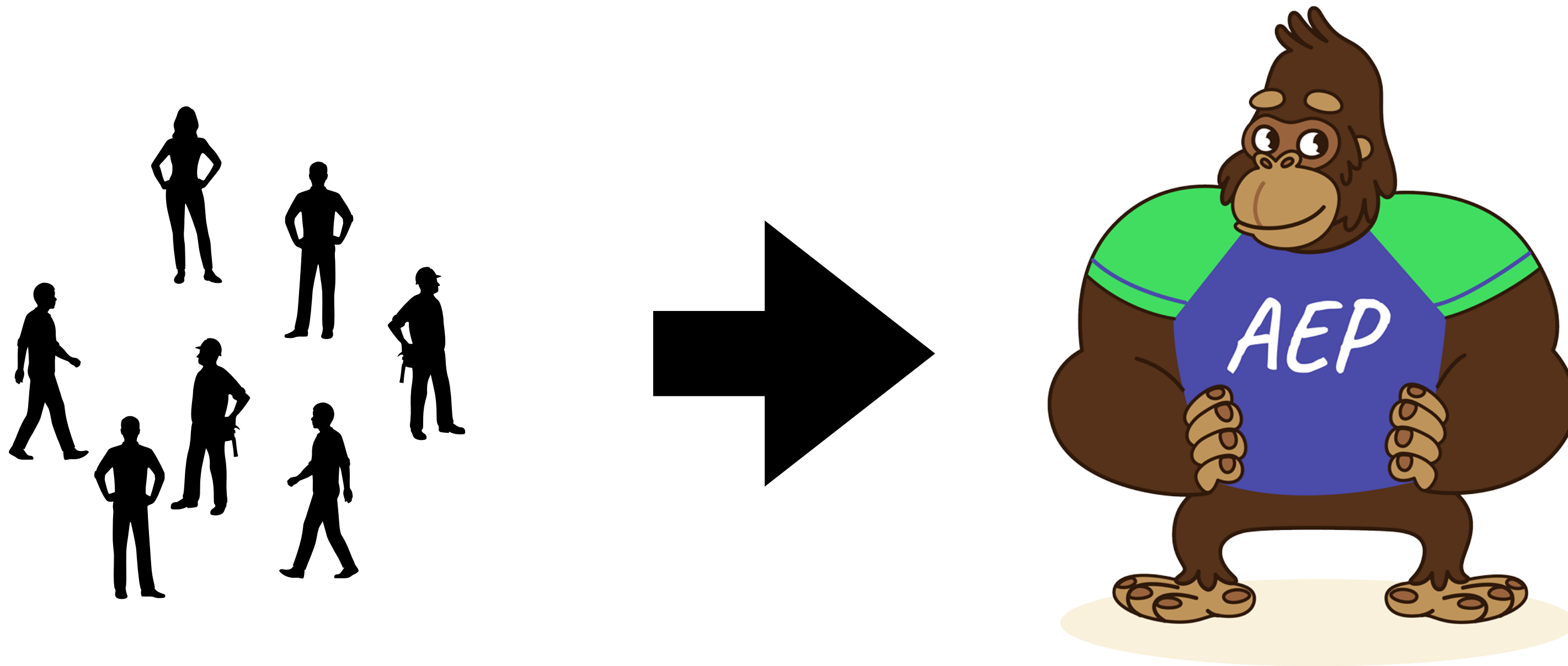
- **Hands-free outreach and scheduling** so you are free to focus 100% on selling
- **Connect with every customer and prospect** that you want to
- **Optimize your calendar** so there aren't gaps and crunches
- **Automatically capture Scope of Appointment forms**





# 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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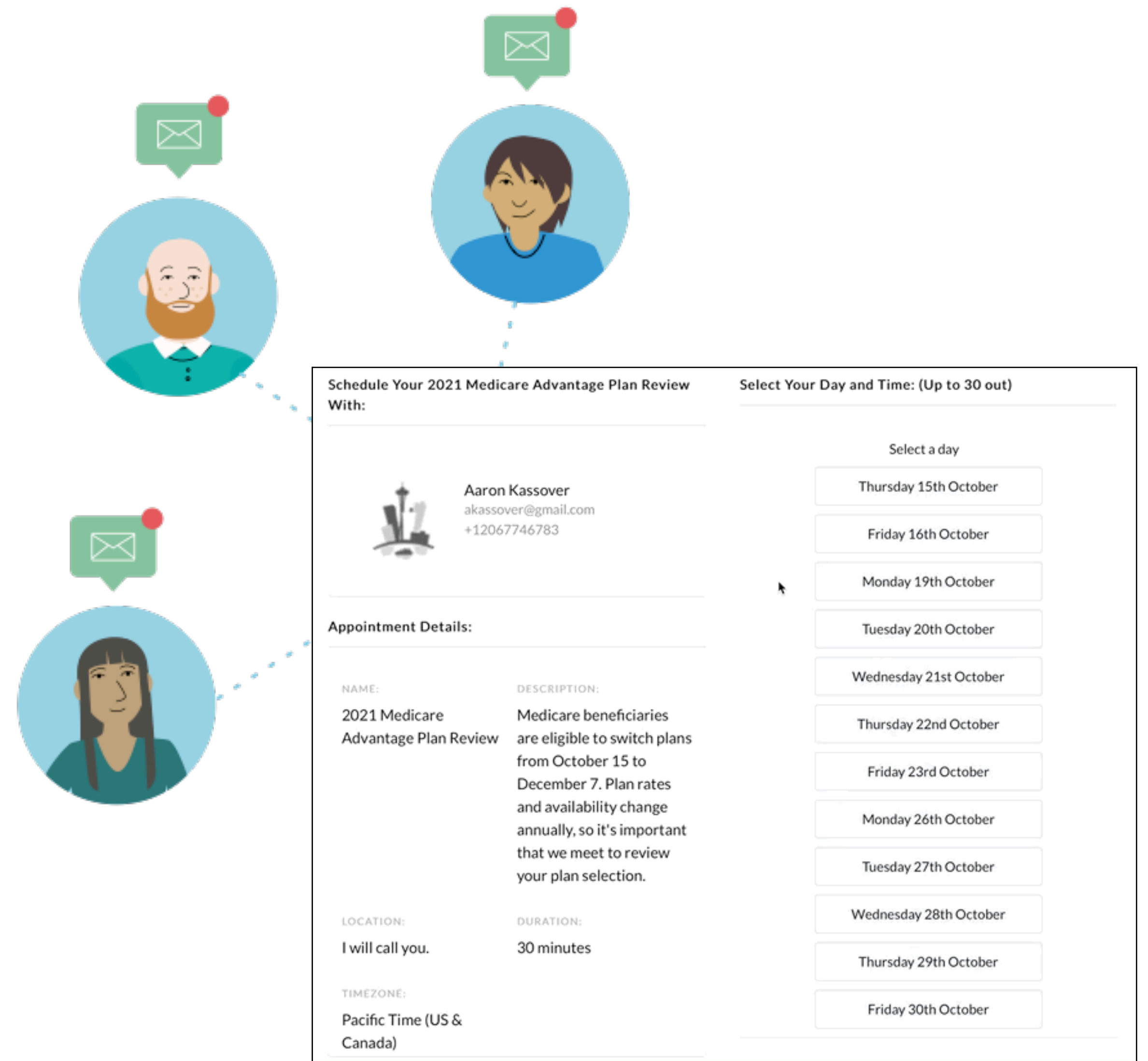


# HOW IT WORKS

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 use a self-service calendar to schedule appointments. Three client avatars, each with an email icon, are connected by dotted lines to a calendar interface. The interface is titled "Schedule Your 2021 Medicare Advantage Plan Review" and includes a section for "Select Your Day and Time: (Up to 30 out)".

**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



# 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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