

July

COMPLETE AHIP

Prepare for and complete your AHIP certification.

Tip: Pay attention to the quizzes as most questions will be used in the final exam, and if you have time, you can take the quizzes more than once to have access to additional questions.

FAMILIARIZE YOURSELF WITH 2021 PLANS

Keep an eye on your inbox for 2021 First Look announcements to learn more about new plans and updates to existing plans.

COMPLETE CARRIER AND PRODUCT SPECIFIC CERTIFICATIONS

Download our [Certifications by Carrier Guide](#) to find complete certification information.

Tip: Discounts and reimbursements are available with some carriers!

August

REGISTER FOR A BROKER CONNECT TRAINING

Make sure you plan to attend a training so you can get the most out of this great new tool during AEP!

Tip: **Broker Connect** enables you to quote, enroll, and manage your book of business all in one place.

CREATE YOUR MARKETING & LEAD GENERATION PLAN

Set goals for AEP 2021 and determine your strategy for achieving those goals through marketing, events, and other lead generation tactics.

Tip: If you need help with your AEP 2021 marketing plan, we're here for you! [Click here to get support.](#)

ORDER SUPPLIES

Based on your marketing plan, order the supplies you need for AEP. Need help? Reach out to the Plan Advisors team.

September

BRUSH UP ON TOOLS & E-APPS

Spend some time familiarizing yourself with Broker Connect and other carrier-specific apps for speedy use during AEP.

GET AHEAD OF THE GAME

You'll thank yourself during AEP for taking the time beforehand to get organized and work ahead where possible.

Tip: Prepping your marketing materials and initiatives in advance is one way to get ahead. ex. scheduling social posts in advance, organizing your print materials for quick access, outlining your follow-up emails for easy execution.