

MEDICARE STRATEGIC PLANNING WORKSHEET

WHY

... am I doing this? – Develop a Simple Mission Statement

... am I motivated to spend valuable time in this effort?

*** (Selfish & Selfless Reasons are both important)

WHAT

... will my Medicare practice LOOK LIKE at the end of the year, in 5 years?

- What is My Vision?

... is my Goal?

- # of sales this year, per month, AEP & SEP, overall renewal income generated

... time can I devote each week? How many hours?

... is the Time Breakdown (% & hrs) I will devote to the 4 areas of my practice?

Marketing/Networking/Prospecting = 60% / hrs

Training = 10% / hrs

Sales = 15% / hrs

Practice Management/Customer Service, etc = 15% / hrs

*** (These allocations will shift slightly in AEP)

HOW

... have I attempted to market and find potential clients?

... would I like to find potential clients?

*** (Prioritize by effectiveness)

... will I implement my prioritized Marketing activities?

*** how many hours will I spend in each activity?

(Make sure time spent is consistent with my intentional time allocation above)

... do I keep track of activities and steps?

- "Gantt Out" Prioritized Top Activities with drill down tasks and time frames

WHEN

... Follow "Gantt Plan" for strategic timeline

... DEEP WORK - block time

... Daily, Weekly, Monthly Indicators - Systems

... will we follow up on my plan? – Regular Coaching sessions with Aaron

TRAINING

- Skills/Knowledge I need to develop

- Self Management

- Effectiveness, Efficiency, Motivation, Time Management

- Knowledge - Product Specific, Medicare, Compliant Presentation, Eligibility Assessment, Marketing Strategies, Referral Network Development, Practice Management, etc

NEXT STEPS