

AEP Marketing Readiness Checklist

Use this quick checklist to ensure your Medicare marketing is ready for AEP

Strategy & Positioning

- ☐ I have identified my primary Medicare audience for AEP
- ☐ I understand their biggest challenge, concern, or question
- ☐ I have a clear AEP marketing goal
- ☐ I can explain what makes my service different
- ☐ I have a clear value proposition
- ☐ I have one core AEP message

Audience Planning

- ☐ I have identified key audience segments
- ☐ I have adjusted my messaging for each segment
- ☐ My messaging addresses specific needs
- ☐ Every message supports the same AEP theme

Marketing Assets

- ☐ My website and landing pages are updated
- ☐ My email marketing content is prepared
- ☐ My social media content is planned
- ☐ My direct mail materials are ready (*if applicable*)
- ☐ My seminar/webinar materials are prepared (*if applicable*)
- ☐ My appointment booking process is working
- ☐ My contact information is accurate

Content & Distribution

- ☐ I selected 2-3 primary marketing channels
- ☐ I have a content schedule for AEP
- ☐ I know how often I will publish
- ☐ I have content that can be repurposed
- ☐ Messaging is consistent across channels

Trust & Reputation

- ☐ My online reviews are current
- ☐ I have a process for requesting reviews
- ☐ I have a referral generation plan
- ☐ Testimonials are ready to share

Tracking & Optimization

- ☐ I know which metrics I will monitor
- ☐ I have a process for tracking appointments and lead sources
- ☐ I am prepared to adjust messaging
- ☐ I have scheduled time to review performance

Final Readiness Check

If all five boxes are checked, you are ready to market confidently during AEP.

- ☐ My audience is defined
- ☐ My message is clear
- ☐ My content is prepared
- ☐ My marketing channels are active
- ☐ My tracking is in place

