

2025 Action Plan



Build a plan to “Thrive in 2025”

Reflect - 2024 Year in Review

Look at the road behind you, to build a better road ahead.

Take time to decompress from AEP

Review and reflect on 2024 and 2025 AEP, while considering the following points.
Write down three answers for each point.

1. This year, I am grateful for:

2. In 2024, I experienced _____ (Success? Stress? A sense of Purpose?)

3. Three words that describe my 2024:

Did you achieve your goals in 2024? Are you happy with your 2024?

What lessons do you want to take with you into 2025, to create the year you want?

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Set Your Compass - 2025 Vision Board

Think about what you more of in 2025.

Do you want more quality time? Do you want to help more people? Do you want more organic referrals? Do you want to travel more? Do you want more adventures? More joy? More knowledge? More awareness?

List at least 5 things:

Using the List above, create a 2025 Vision Board.

Get creative. If you are computer savvy, use your favorite design program.

If you are tactile, go “old school” art project. Use magazines, newspapers, stickers, etc.

Have fun with it!

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Create a Plan - 2025 Business Plan

This will be the year to **seek the Opportunity** and **Transform the industry**. Use your vision board to help guide you through creating a business plan to manifest the year you want.

Use these principles, or your own, to create a business plan.



Build



Educate



Serve



Transform

Build -

Be Active – Community Relationships

- Organizations (Senior Centers, Churches, Charities, Advocacy Groups)
- Providers
- PCP, Specialists, Dentists, Ancillary, etc
- Pharmacists
- Patient Advocates
- Case Managers / Nurses

Be Involved – Industry Presence and Network

- **NABIP - National Association of Benefits and Insurance Professionals**
 - <https://nabip.org/membership/join-now>
- **NAIFA - National Association of Insurance and Financial Advisors**
 - <https://belong.naifa.org/join>
- **Boards / Charities**

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Educate –

Be the Expert - Build Learning into your Plan

Schedule learning into your year. Select one book per quarter to read.
Subscribe to industry news publications.

Get educated and stay in the know.

- **Know your Craft –**
 - Know the Products, know your Market, know Compliance
- **Know the industry**
 - Read and educate yourself on current industry issues
 - Seek to understand how the industry works

Be Vocal – Visibility and Presence in your community

- **Give Educational Talks – Not just to Senior Centers**
 - Patient Advocacy Groups
 - Caregivers
 - Schools
 - Employer groups
- **Talk about what you do**

Perception of what you do and why you do it, is the public’s
Reality of who you are. How do you want to be known?

 - Beneficiary Advocate
 - Educator
 - Public Servant

ASK for your client’s support

- **They can be your advocate, as you are theirs**
- **Ask clients to complete testimonial surveys**
 - <https://nabip.org/advocacy/agentclient-surveys>

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Serve –

Be the Bridge

Build your plan to include client check-ins, special occasions, and Routine service work.



- **Regular Client Check-Ins**
 - Start with 30-60-90 days check-ins
 - Continue with quarterly check-ins
- **Routine Service**
 - A lot time each weeks for routine service work
- **Get to know your clients – Ask Questions!**
 - Family
 - Faith
 - Social Determinants of Health

Protect your client – Retain your client

Your client’s health and wellbeing go beyond their primary health insurance policy. Financial, mental and emotional wellbeing are just as vital to a person’s overall quality of life. Well protected clients are clients for life.

Create a plan that includes learning 2-3 new products this year.

- Offer a diverse portfolio of products to provide security and safety for your client’s financial wellbeing.
 - Final Expense
 - Hospital Indemnity
 - Term Life
 - Accident
 - Critical Illness
 - Cancer

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Transform –

Your Business

Change your thoughts, change your life.

Shift thoughts around goal setting from, I want to make more money to I get to help more people, and I get paid to help more people.

Do what you love, for the right reason, and money will flow to you.

Set goals that align with your purpose.

Public Perception

Agents and Brokers who are in this industry for the right reason, acting from a place of **GENUINE** love for serving others, being a bridge over pitfalls for their clients and acting as their healthcare advocate will alter the stereotype of an “insurance agent”.

Be the Good. Be the Bridge.

The Industry

By **Building** your Industry Presence and being an active, vocal advocate for your profession, for your clients and for change, YOU have the power to reshape and transform the Healthcare industry.

We often think that “I am only one person, what can I do?” The truth is that you have the power to radically shift the industry, if you are doing it for the **RIGHT REASONS**.

If you do what you do to improve the lives of the clients you serve, the industry **NEEDS YOU** to step up.

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We are your partner.

Our mission is guide you through industry changes and support you in finding opportunities in those changes.

Your relationship manager would be honored to have the opportunity to assist you in developing your 2025 Action Plan or hosting a 2025 Vision Board Party for your agency.

Please reach out to your relationship manager, if you would like to schedule an event.