



EnrollHere

PLATFORM READINESS CHECKLIST Score Your Agency

Introducing the AEP Platform Readiness Checklist

A Structured Way to Identify Gaps Before AEP Volume Arrives

Successful AEP preparation starts long before the first enrollment. The EnrollHere AEP Platform Readiness Checklist helps agencies identify operational gaps before peak enrollment begins, giving your team time to resolve issues before October arrives.

The checklist reviews the 10 areas that have the greatest impact on AEP success, including user access, call routing, compliance, reporting, licensing, lead distribution, enrollment workflows, carrier integrations, commissions, and team readiness.

Score Yourself. Don't Just Check Boxes.

Checking a box doesn't prove you're ready. That's why the checklist is designed to be scored, not completed. Rate your organization from one to 10 on each item, and treat every score below seven as an opportunity for improvement. The questions that make you hesitate are often the ones worth addressing before AEP begins.

Review your organization to ensure:

- User access and permissions are current.
- Call routing and queues are configured correctly.
- Compliance settings match your current operations.
- Dashboards and reporting are ready for AEP.
- Lead distribution is automated and accurate.
- Enrollment workflows and carrier integrations have been tested.
- Agent licensing and certifications are current.
- Commission reporting reflects your current business.

Get the Most From the Review:

- Complete the checklist in August or early September.
- Verify every assumption instead of checking boxes.
- Prioritize access, routing, and compliance first.
- Review low-scoring areas with your Customer Success Manager.
- Re-score your organization before AEP begins.

Get Started

The AEP Platform Readiness Checklist is available from your EnrollHere Customer Success Manager. Complete your review, then schedule an AEP Readiness Call to validate your configuration, address gaps, and ensure your platform is ready for a successful AEP.

Questions? Contact your Customer Success Manager or email success@enrollhere.com.

EnrollHere | AEP PLATFORM READINESS: Score Your Agency

Rate your agency 1 to 10 on each item. Anything you score under 7 is a gap your Customer Success Manager closes on your AEP Readiness Call. Volume is coming. This is how you find the weak points before it does.

1. User Access & Permissions
How confident are you that every agent, manager, and admin has the correct role and access right now? Score 10 only if you have verified it this month.

2. Dialing & Call Routing
Have you tested inbound and outbound routing, queue assignments, agent tags, and numbers end to end? Score 10 only if you recently configured calls across the right access.

3. Compliance Settings
Are call recording, AI compliance monitoring, required disclosures, and QA workflows configured and confirmed? Score down if any of these is "I think so."

4. Dashboards & KPIs
Can every executive and manager who needs it pull lead performance, sales activity, conversion, and productivity in real time without asking someone? Score 10 whether they can do it enabled today.

5. Team Readiness
Is agent onboarding, refresher training, and role-specific coaching done, not scheduled? Score by what is complete, not planned.

6. Licensing & Certifications
Are your agents' state licenses and carrier certifications current and documented? Score 10 when you can produce on demand, not when you assume it's handled.

7. Lead Distribution
Are your lead sources, routing rules, and ownership set so leads land with the right agent fast? Score down if leads sit unassigned or route by hand.

8. Enrollment & Policy Workflows
Have you tested the enrollment and policy workflows for the specific carriers and product lines you actually want? Score only the ones you test, and only if you have tested them.

9. Commissions & Production Reporting
Do your commission and production views reflect your current setup so you can track output through AEP? Score 10 whether the numbers you would report today are ones you trust.

10. Book Your AEP Readiness Call
Total your scores. Every item under 7 is on the agenda. Your CSM walks the list with you and closes the gaps before peak traffic hits.
Book your call → success@enrollhere.com.

Mark Your Answers Here: [Rating Scale 1-10]

Agency Score: _____

Simplify. Optimize. **Grow!**



Rate your agency 1 to 10 on each item. Anything you score under 7 is a gap your Customer Success Manager closes on your AEP Readiness Call. Volume is coming. This is how you find the weak points before it does.

1. User Access & Permissions

How confident are you that every agent, manager, and admin has the correct role and access right now? *Score 10 only if you have verified it this month.*

2. Dialing & Call Routing

Have you tested inbound and outbound routing, queue assignments, agent tags, and numbers end to end? *Score by how recently you confirmed calls reach the right teams.*

3. Compliance Settings

Are call recording, AI compliance monitoring, required disclosures, and QA workflows configured and confirmed? *Score down if any of these is "I think so."*

4. Dashboards & KPIs

Can every executive and manager who needs it pull lead performance, sales activity, conversion, and productivity in real time without asking someone? *Score by whether they can do it unaided today.*

5. Team Readiness

Is agent onboarding, refresher training, and role-specific coaching done, not scheduled? *Score by what is complete, not planned.*

6. Licensing & Certifications

Are your agents' state licenses and carrier certifications current and documented? *Score by what you can produce on demand, not what you assume is handled.*

7. Lead Distribution

Are your lead sources, routing rules, and ownership set so leads land with the right agent fast? *Score down if leads sit unassigned or route by hand.*

8. Enrollment & Policy Workflows

Have you tested the enrollment and policy workflows for the specific carriers and product lines you actually run? *Score only the lines you sell, and only if you have tested them.*

9. Commissions & Production Reporting

Do your commission and production views reflect your current setup so you can track output through AEP? *Score by whether the numbers you would report today are ones you trust.*

10. Book Your AEP Readiness Call

Total your scores. Every item under 7 is on the agenda. Your CSM walks the list with you and closes the gaps before peak traffic hits.
Book your call → success@enrollhere.com.

Mark Your Answers Here:

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

Agency Score