

Client Communications Calendar

ABC Insurance - Client Communications Planning Calendar 2012

Schedule for each client phone meetings at least twice per year
Monthly: All employee benefits clients get our custom newsletter Employee Benefits Report

January	February	March
In-house seminar: PPACA Update and what it means to your health insurance program	Send dental care brochure to all employee benefits client not already using a dental benefits program	
April	May	June
Host webinar on fundamentals of annuities	Send client appreciation post cards	In-house seminar: PPACA Update and what it means to your health insurance program
July	August	September
Agency participates in 4 th of July event.		Send employee benefits clients brochure on benefits of offering voluntary benefits to employees.
October	November	December
Host webinar small business succession planning strategies	Send Agency Calendar to client for next year.	Send Holiday cards