

AEP 2027 WAR ROOM LITE

Your daily Medicare AEP command center — Quick-Start Guide

SET UP IN 3 MINUTES

- 1. Open the SETTINGS tab.** Fill in the **yellow cells** only: your agency name, AEP start & end dates, and your enrollment goal. Everything else updates automatically.
- 2. Open PIPELINE.** Add a row per prospect using a **Client ID or initials** (never Medicare/SSN numbers). Pick Lead Source, Product, and Status from the dropdowns, and set a **Next Follow-up** date.
- 3. Log your day in DAILY LOG.** One row per workday: calls, contacts, appointments, apps, enrollments, hours. Your weighted Activity Score and pace calculate instantly.
- 4. Open COMMAND CENTER every morning.** One screen tells you: days left, enrollments, goal remaining, who's overdue, what's converting, and your product mix.
- 5. Work the OVERDUE queue first.** Red follow-up flags = call these before chasing new leads. That's where the money already is.

WHAT EACH TAB DOES

START HERE	Orientation, color key, and the 10 reasons this tool wins.
COMMAND CENTER	Your morning dashboard: countdown, pace status, conversion funnel, product mix, today's control panel.
DAILY LOG	Fast daily activity entry + weighted score, daily goal, and pace heatmap.
PIPELINE	Every prospect, follow-up dates, overdue flags, application stage, and stage aging.
SETTINGS	The only tab you configure — dates, goal, and activity weights.

COLOR KEY

TEAL = ahead / healthy

GOLD = watch closely

CORAL/RED = urgent / overdue

Use it in Excel **or** Google Sheets

OPEN IN GOOGLE SHEETS (FREE)

1. Go to **sheets.google.com** and sign in.
2. Click **File** → **Import** → **Upload** and drop in **AEP_2027_War_Room_Lite.xlsx**.
3. Choose **“Replace spreadsheet”** (or Create new). Done — dropdowns, formulas, and color rules carry over.

Tip: in Sheets, color heatmap bars may show as plain numbers — all formulas and the dropdowns still work perfectly.

YOUR 60-SECOND DAILY ROUTINE

Morning: Open COMMAND CENTER. Check pace status and the OVERDUE count.

Then: Go to PIPELINE, sort by the Follow-up Flag, and clear every **OVERDUE** first.

All day: Update statuses as prospects move stage to stage.

End of day: Log the day in DAILY LOG and read your Activity Score and pace.

PRIVACY & COMPLIANCE

Use a **Client ID or initials only**. Do not store Medicare numbers, Social Security numbers, medical details, or payment data in this workbook. This is an operational tracker that supports business organization — it does **not** replace a compliant CRM, a carrier enrollment system, CMS guidance, legal advice, or required recordkeeping. Verify current rules and AEP dates before each selling season.

Ready for the full year? Medicare Agent OS V8 adds 20+ tabs — client roster, commissions, retention, cross-sell & compliance vault. Search “Medicare Agent OS V8” in our shop.

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