

TEMPLATETITANHQ

Client Touchpoint Calendar

Stay top-of-mind all year so renewal is a formality

2026 EDITION

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Start Here

Most agents only call at renewal. Top agents have a known next touchpoint for every client, all year — so renewal is a formality, not a fight. This calendar turns that into a fill-in-the-blank system.

The retention math (why this is the cheapest growth you'll ever buy):

Three or more meaningful touches a year is the threshold for real retention impact (J.D. Power). Agencies that automate birthday and policy-anniversary touches see roughly +15% more referrals and +18–24% retention (IIABA 2025). Keeping a client = keeping the renewal commission you already earned.

What's inside

- The 12-Month Touch Calendar — a month-by-month plan mapped to the Medicare year.
- Done-for-you messages for every occasion — birthday, plan anniversary, holiday, seasonal check-in, value touch, pre-AEP heads-up (email and/or text — format varies by occasion).
- A simple Touch Tracker — so every household has a known next touchpoint.

How to use it (5 minutes, once)

1. Open in Word or upload to Google Docs. Find-and-replace [BRACKETS] with your info; save as your master.
2. Each month, open the calendar, copy that month's message, drop in client names, and send.
3. Log the next touch for each client in the Tracker. That's the whole engine — calendared, not reactive.

Compliance note.

Send only to clients who've consented to contact; honor opt-outs immediately (TCPA/CMS). Keep messages relational — no specific plan names, premiums, or benefit claims. Follow CMS rules + get FMO/carrier approval. Not legal/tax/compliance advice.

The 12-Month Touch Calendar

Mapped to the Medicare year. Plus each client's birthday and plan-anniversary touch in their own month.

Month	Touch	Purpose
January	"Happy New Plan Year" note	Welcome them into the new year; remind them you're their person
February	Value touch / quick check-in	Stay warm in a quiet month
March	"OEP ends 3/31 — all good?" reassurance	Carry new clients past the rapid-disenrollment window
April	Spring check-in	Confirm nothing's changed with doctors/Rx
May	Value touch (helpful tip)	Be useful, not just present
June	Mid-year "just checking in"	The touch almost no other agent makes
July	Value touch / summer note	Light, friendly, no agenda
August	Pre-AEP heads-up	Set expectations: "I'll reach out about your review soon"
September	Book the annual review	Beat the mailers; tie into the Annual Review Kit
Oct 1 – Dec 7	Annual review season (AEP)	The big one — run reviews, confirm or adjust
November	Holiday / gratitude note	Goodwill = referrals
December	Year-end thank you	Close the year warm; tee up January
Their birthday month	Birthday message (1-2 touches)	Highest-response touch of the year
Their plan anniversary	Anniversary note	"A year with the right coverage — let's keep it that way"

Done-For-You Messages

Copy, drop in the name, send. Keep them relational — never a plan pitch.

Birthday

BIRTHDAY — text / email

Happy Birthday, [First Name]! 🎉 Just wanted to take a second to celebrate you today. It's a pleasure being your Medicare agent — and as always, I'm here if you ever need anything. Enjoy your day! — [Agent Name]

Plan Anniversary

ANNIVERSARY — text / email

Hi [First Name] — it's been a year since we got your coverage squared away! Time flies. I'll be reaching out before renewal to make sure everything still fits, but in the meantime, you know where to find me. Thanks for trusting me with this. — [Agent Name]

Holiday / Gratitude

HOLIDAY — text / email

Hi [First Name], as the year winds down I just wanted to say thank you for letting me be your Medicare agent. It genuinely means a lot. Wishing you and your family a warm and healthy holiday season. — [Agent Name]

Seasonal / Value Touch

VALUE TOUCH — text / email

Hi [First Name], no agenda here — just your yearly reminder that I'm in your corner for anything Medicare. New prescription, a confusing bill, a doctor question? Call me first and I'll help you sort it. — [Agent Name] • [Phone]

Mid-Year Check-In

MID-YEAR — text

Hi [First Name], [Agent Name] checking in — everything still working well with your plan, doctors, and pharmacy? If anything's come up, just reply or call. Here to help. — [Phone]

Pre-AEP Heads-Up

PRE-AEP — email

Subject: Quick heads-up about your yearly Medicare review

Hi [First Name], a friendly heads-up: review season is coming up, and I'll be reaching out to go over your plan and make sure it still fits you for next year — before anything renews. No action needed yet; just know it's on my radar so you don't have to worry about it. Talk soon! — [Agent Name]

Touch Tracker

Every household gets a known next touchpoint. Update it as you go — calendared, not reactive.

Client	Birthday	Plan anniv.	Last touch	Next touch (date + type)	✓
[Name]	[/]	[/]	[]	[]	[]
[Name]	[/]	[/]	[]	[]	[]
[Name]	[/]	[/]	[]	[]	[]
[Name]	[/]	[/]	[]	[]	[]
[Name]	[/]	[/]	[]	[]	[]
[Name]	[/]	[/]	[]	[]	[]
[Name]	[/]	[/]	[]	[]	[]
[Name]	[/]	[/]	[]	[]	[]

Tip: keep the full version in your CRM — pairs with our Medicare Agent CRM + OS and Client Retention Tracker.

More tools for agents at TemplateTitanHQ

Annual Review Kit • New-Client Welcome Packet • Client Retention Tracker • Agent CRM + OS

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