

OEP Goal Tracker

Creating your own ACA success starts with creating a plan. Most agents sell with multiple carriers, in multiple states, or both. Toss in state-based exchanges, and it can get confusing—quick. Use this document to organize before sales season starts. Keep track of which carriers you've contracted with, which states you're selling specific products in, and any preferred plans you have.

Remember, getting organized now helps you find your path to success this OEP that much faster.

Carrier	State	Contracted?	Writing No.	Preferred Plan	Commissions

Tips & Resources

Want to update your client's prescriptions quickly?
Consider a bulk emailing service or a form service, or a platform that does both, like MyMFG+.

Need to schedule a lot of appointments?
Try a calendar service that offers client booking, like MyMFG+.

Select Date & Time

October 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

08:00 AM

08:30 AM

09:00 AM

09:30 AM

10:00 AM

Bulk Email Stats

All	Accepted	Delivered	Opened	Clicked	Replied	Unsubscribed	Complained	Bounced	Failed	Skipped
Name	Email	Status	Date Updated							
		Delivered	Apr 21 2025 03:13 PM (EDT)							
		Delivered	Apr 21 2025 03:13 PM (EDT)							
		Opened	Apr 21 2025 03:13 PM (EDT)							

Download

MyMFG+



Looking to market yourself locally?
Get our free OEP Grassroots Marketing Guide by calling today!

(866) 373-7604

Have lots of clients you need to meet at home?
Organize by area and plan an optimal route using programs like MapQuest or MyRouteOnline.*

*Not affiliated.

Trying to estimate your commissions?
Check page 4 of our guide, Create Your Own ACA Success, to see our simple method for crunching the numbers!



(866) 373-7604
messerfinancial.com

Write It Down

Most people lose 20% of their book of business per year. If you're trying to plan ahead and grow your book, it's important to set a goal for how many clients you want to gain. Are you trying to keep your book, or grow it?

How many clients you
currently have:

20% loss:

How many clients you need
to gain to break even:

How many clients you
want to grow by:

For a total of:

Are you using lead generators? Here are some things to think about if you are.

How much are you
spending per lead?

How much do you
make per lead?

What are you
making in profit?

What is your
overall budget?


Brainstorming

What are some other goals you can set for yourself? Do you have any ideas on how to generate leads? What does your schedule look like for the 76 days that comprise OEP?

Calendar

What does your calendar look like? Mark any important dates you may need to pay special attention to, or times when you can't work. Plan ahead for your 76 days of work - they're going to be busy!

November 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
first day of OEP 						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

December 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	19	30	31			

January 2026

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15		

 last day of OEP