

Memorandum

TO: John Smith, Director of Sales

FROM: Autumn Jessen, Quality Analyst

DATE: July 15, 2021

SUBJECT: Preparation for the 2021 Annual Enrollment Period

I am writing to inform you that QA Team has completed the creation of the annual training course and coaching plans for Sales Agents. This updated training course takes into account several updates to state and federal regulations that affect the products we sell. The coaching plans have been streamlined, taking into account the Sales Managers increased workload during this enrollment period.

You asked that I inform you once the training course and coaching plans have been completed. With three months until AEP officially begins, there is time to make any requested adjustments to any of the materials. In order to move forward with the project, I request the following:

- Review the attached 2021 AEP Annual Training Course.
- Review the attached 2021 AEP Coaching Guide.
- Communicate any requested changes (or confirm approval) by September 15, 2021 to me.

The Annual Enrollment Period is the busiest part of the year. During this timeframe, quality offenses tend to increase. For example, per the attached 2020 Post-AEP Statistics, Recorded Call offenses increased by 10% compared to pre-AEP statistics. By reviewing last year's top trending offenses and projecting this year's top trending offenses, the QA Team is confident XYZ will have a successful and compliant AEP.

Thank you,

Autumn Jessen

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Attached: 2020 Post AEP Statistics, 2021 AEP Annual Training Course, 2021 AEP Coaching Guide