



2026

## Sales & Planning Calendar

*Plan smarter. Sell stronger. Earn more.*



# 01 JANUARY

## Kick Off the Year Strong

*Set your sales goals and review new plan updates*

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1 New Years Day	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19 Martin Luther King Jr. Day	20	21	22	23	24
25	26	27	28	29	30	31

### Tip/ Reminder

- ✓ Map out your open enrollment and special enrollment period sales goals.
- ✓ National Glaucoma Awareness Month

### Broker Toolkit Pick



Top Open Enrollment Questions for Dental Insurance Broker guide.

[Download Now](#)

### Notes



# 02

## FEBRUARY

### Client Touchpoints

Reconnect with renewal clients and cross-sell vision options.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9 National Toothache Day	10	11	12	13	14 Valentine's Day
15	16 President's Day	17	18	19	20	21
22	23	24	25	26	27	28

#### Tip/ Reminder

- ✓ Perfect time to follow up on renewals.
- ✓ National Children's Dental Health Month

#### Broker Toolkit Pick



Pitching  
Preventive  
Care: A Broker's  
Guide to Client  
Conversations

[Access the Guide](#)

#### Notes





## Spring Momentum

*Host a webinar to educate groups on benefits value.*

# 03 MARCH

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6 Employee Appreciation Day	7
8 Daylight Savings Time	9	10	11	12	13	14
15	16	17 St. Patrick's Day	18	19	20 World Oral Health Day	21
22	23 World Optometry Day	24	25	26	27	28
29	30	31				

### Tip/ Reminder

- ✓ Educate clients on preventive benefit value.
- ✓ Save Your Vision Month

### Broker Toolkit Pick



Maximize your return: Insurance  
Broker Tax Deduction Checklist.

[View Guide](#)

### Notes





## Mid-Year Prep

*Audit your pipeline and plan summer outreach*

# 04

## APRIL

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3 Good Friday	4
5 Easter Sunday	6	7	8	9	10	11
12	13	14	15 Tax Day	16	17	18
19	20	21	22 Administrative Professionals Day	23	24	25
26	27	28	29	30		

### Tip/ Reminder

- ✓ Prep for summer selling season.
- ✓ Oral Cancer Awareness Month
- ✓ Women's Eye Health & Safety Month

### Broker Toolkit Pick



Support clients with ready-to-share educational content about oral health and early screenings.

[Share Now](#)

### Notes





05  
MAY

## Summer Sales Season

*Leverage employee appreciation themes for group prospecting.*

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2
3	4	5	6	7	8	9
10 Mother's Day	11	12	13	14	15	16
17	18	19	20	21	22	23
24 Memorial Day	25	26	27	28	29	30

### Tip/ Reminder

- ✓ Group sales and dental campaigns launch.
- ✓ National Dental Care Month
- ✓ Healthy Vision Month

### Broker Toolkit Pick



A Broker's Guide  
on Making  
Dental Benefits  
Stand Out



[View Guide](#)

### Notes



# 06 JUNE

## Bonus Push

*Confirm you're on track for mid-year incentives.*

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31 National Smile Day	1	2	3	4	5	6 National Eyewear Day
7	8	9	10	11	12	13
14	15	16	17	18	19 Juneteenth	20
21 Fathers Day	22	23	24	25	26	27
28 Insurance Awareness Day	29	30				

### Tip/ Reminder

- ✓ Bonus reminders and pipeline check.
- ✓ Oral Health Month

### Broker Toolkit Pick



Make every conversation count. Use this quick Sales Call Cheat Sheet guide.



[Download Now](#)

### Notes





## Resource Refresh

Download updated broker kits and plan summaries.

07  
JULY

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3	4 Independence Day
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	1

### Tip/ Reminder

- ✓ Broker resource refresh.
- ✓ UV Safety Month

### Broker Toolkit Pick



Keep the  
Momentum  
During the  
Summer  
Slowdown  
Tipsheet

→ [View Tipsheet](#)

### Notes





# Open Enrollment Countdown

*Begin client presentations and renewal strategy calls.*

08  
AUGUST

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
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					

**Tip/ Reminder**

- ✓ Launch prep campaigns and meetings.
- ✓ Children's Eye Health & Safety Month

**Broker Toolkit Pick**



Engage Clients, Grow Your Business: Back to School Social Post Pack for Brokers

 [Download Here](#)

**Notes**







## Ramp Up

*Submit applications early for smooth open enrollment processing.*

# 09

## SEPTEMBER

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5
6	7 Labor Day	8	9	10	11 Patriot Day	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

### Tip/ Reminder

- ✓ Focus on pre- open enrollment conversions.
- ✓ National Gum Care Month

### Broker Toolkit Pick



- Open Enrollment Prep Tipsheet.
- Ensure a smooth OE season with our guide.

[Download Here](#)

### Notes



# Open Enrollment Launch

Weekly check-ins and client support.

# 10 OCTOBER

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2	3
4	5	6	7	8 World Sight Day	9	10
11	12 Indigenous People's Day	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31 Halloween

## Tip/ Reminder

- ✓ Weekly reminders, push sales.
- ✓ National Dental Hygiene month
- ✓ Vision Awareness Month

## Broker Toolkit Pick



Digital Marketing  
Tips for Brokers:  
- LinkedIn  
- Handbook -  
- Social Media  
Guide



[Download Here](#)

## Notes



## Bonus Focus

*Close out your Q4 sales and submit final cases.*

# 11

## NOVEMBER

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 Open Enrollment Begins	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 Cyber Monday			Thanksgiving	Black Friday	

### Tip/ Reminder

- ✓ Close out last-minute open enrollment sales.
- ✓ Mouth Cancer Action Month
- ✓ National Diabetes Month

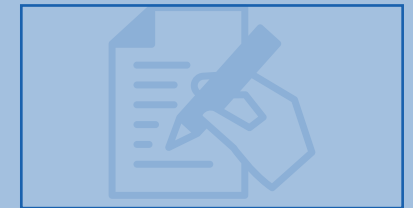
### Broker Toolkit Pick



End of Year  
Client Retention  
Tips: Top 3 Step  
to Sell Your Skills  
& Services

[View the Guide](#)

### Notes



## Celebrate Success

*Thank your clients and plan next year's goals.*

# 12

## DECEMBER

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		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		
			New Years Eve			

### Tip/ Reminder

- ✓ Send client thank-you's, review performance.

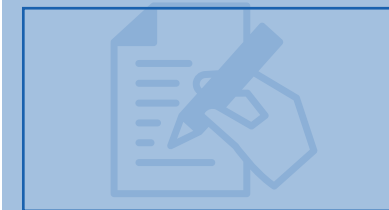
### Broker Toolkit Pick



5 Ways to Show  
Appreciation to  
Your Insurance  
Clients

➔ [Download the Guide](#)

### Notes





***Your success is our focus —  
every month, every client.***

**Stay Connected**

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