



# 2026

## Sales & Planning Calendar

*Plan smarter. Sell stronger. Earn more.*



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# 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



 [Download Now](#)

### Notes



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# 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
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



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## 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 World Optometry Day	23	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



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## Mid-Year Prep

*Audit your pipeline and plan summer outreach*

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3	4
					Good Friday	
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		

# 04 APRIL

### 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



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# 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	11	12	13	14	15	16
17	18	19	20	21	22	23
24	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



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# 06

## JUNE

### Bonus Push

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

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

#### 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



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07  
JULY

## Resource Refresh

Download updated broker kits and plan summaries.

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



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# 08 AUGUST

## Open Enrollment Countdown

*Begin client presentations and renewal strategy calls.*

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



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# 09

## SEPTEMBER

### Ramp Up

*Submit applications early for smooth open enrollment processing.*

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3	4
			6	7	8	9
			13	14	15	16
			20	21	22	23
			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



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## 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	9	10
				World Sight Day		
11	12	13	14	15	16	17
	Indigenous People's Day					
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



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## Bonus Focus

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

# 11

## NOVEMBER

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1  <b>Open Enrollment Begins</b>	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  <b>Thanksgiving</b>	27  <b>Black Friday</b>	28
29	30  <b>Cyber Monday</b>					

### 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



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## Celebrate Success

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

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	Christmas Day	

**12**  
**DECEMBER**

### 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



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

### **Stay Connected**

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