Spark

Medicare Marketing

How Grassroots Marketing will Grow your Business

Pam Harrison

Medicare Trainer & Compliance Lead



April, 2024

Agenda

- Why Grassroots Marketing?
- Have a Plan
- Prepare
- Community Partners/Events
- Client Referrals
- Seminars
- Social Media
- Tips for Success



What is Grassroots Marketing and Why is it important?

What is Grassroots Marketing? Why is it important?

- Grassroots Marketing just means marketing from the “ground up”
- Your message doesn’t come from “ads”, but from the community where your prospects live and the people they know.

Why is it important in your overall marketing efforts?

- Cost Effective
- Easy to get started
- Service orientated - less “salesy”
- Establishes yourself in the community as an “expert”
- Build relationships

> “People don't care how much you know until they know how much you care”
>
> — **Theodore Roosevelt**

Have a Plan & Prepare

Planning for Success in Grassroots Marketing

Brainstorm and Research

- What are your objectives?
- Identify neighborhoods/towns
- Determine your target audiences
- Research
  - Possible community partners
  - COI-Centers Of Influence
  - Events
- Budget
- Compliance
- Schedule in calendar in advance



Brainstorm

Brainstorm and Research

Identify neighborhoods and or towns close by and write down possible partners

- Senior Centers
- Assisted Living/High rise senior apartments
- Gyms - Silver Sneakers, Silver & Fit, Renew Active
- Pharmacies - locally owned
- P & C Agents
- Financial Advisors that don't sell Medicare
- Churches
- Bowling Alley
- Chamber of Commerce
- Dollar Stores
- Local Public Transportation
- Goodwill (Senior Day)
- Golf Courses/Country Clubs
- Arts & Crafts Classes (Hobby Lobby, etc)
- Provider Offices
- Elder Law Firms that don't sell Medicare Plans
- Food Banks
- Laundromats
- Breakfast Diners - go in at 10am
- Senior Bowling leagues/Pickleball
- Farmers Markets
- HR Managers of companies

Brainstorm

Use your own connections first

Your:

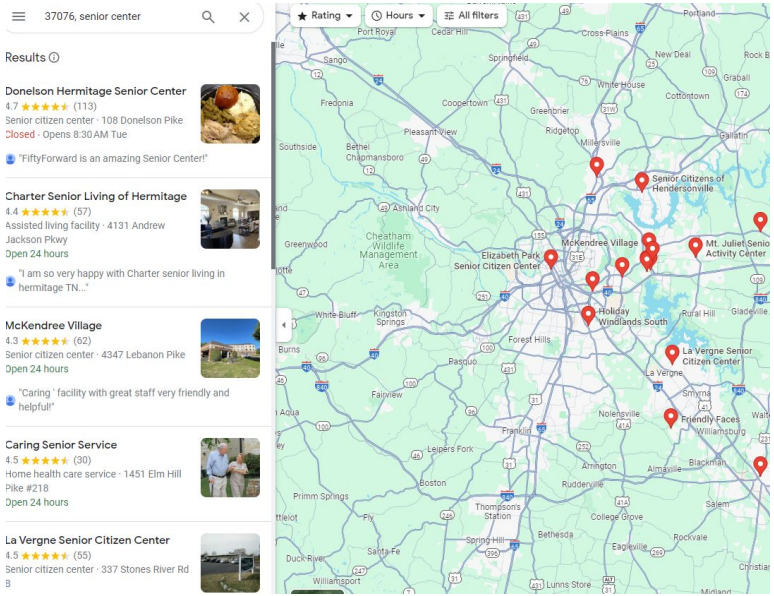
- Doctor(s)
- Dentist
- Chiropractor
- Eye Dr.
- Gym
- Bank(talk to financial planner or Trust officer)
- Church
- Clubs/Hobbies
- Local restaurants you frequent

Your Current Clients:
Ask your current clients where they go/who their contacts are:

- Doctor(s)
- Financial Planner
- Church
- Gym
- Clubs/Hobbies/Volunteer
- Senior Center

How to Research

- Google
  - Go to Google Maps
    - Enter Zip code, Place of Interest
    - Ex: 37076, Senior Centers
    - Make a list/spreadsheet of places to visit



Go to the websites, look for activities coordinator/events coordinator

How to Research

When looking at a potential partner website, keep in mind:

- **Who** - Who do I need to talk to about volunteering/getting involved at this facility? Activities Coordinator? Executive Director?
- **What** - What types of activities are they already doing that I can offer to help with
- **When** - Do they have recurring activities that I can possibly take over for them? Bingo, Exercise
- **Why** - Why do they need me in their facility? Year round FREE help with Medicare Questions, bring in other partnerships within the community - Dr's, Attorneys, etc.

How to Research

What to look for on Websites

- **Monthly Newsletter** - Will have a monthly schedule of events, you can see what they are already doing
- **Contact Information**- Executive Directors, Activities Coordinators, hours of operation
- **Social Media** - Do they have a Facebook Page they post on regularly?
- **Take down** - Address, hours, point of contact and their info, phone number, events you may want to be part of, any other helpful information



MON	TUES	WED	THURS	FRI
1 8:30 Open Pool 8:30 Line Dancing 11:30 Lunch 12:15 Silver Sneakers	2 8:30 Card Playing 9:15 M.R.H. B/P 11:00 BINGO	3 8:30 Group Pool 9:00 Mule Day Canasta Tournament 11:30 Lunch	4 CLOSED Mule Day Festivities	5 CLOSED Mule Day Festivities
8 8:30 Open Pool 8:30 Line Dancing 9:00 Rook Game 11:30 Lunch 12:15 Silver Sneakers 1:00 Ukulele 2:00 Tai-Chi 4:15 Zumba 5:00 Yoga 7:00 Ball Room Daning	9 8:30 Card Playing 9:00 Cornhole Tournament 10:00 Stroke Workshop 11:00 BINGO 1:00 Computer Class	10 8:30 Group Pool 8:30 Card Playing 9:00 Zumba 10:00 Acrylic on Canvas 10:30 Line Dance 11:30 Lunch 12:00 Mens Pool Class 12:15 Silver Sneakers 2:00 Tai Chi	11 8:30 Card Playing 8:30 Open Pool 9:00 Phase 10 Tournament 10:00 Stroke Workshop 10:00 Womens Pool Class 11:00 BINGO 11:30 Lunch 12:00 F.R.A.	12 8:30 Rook Tournament 8:30 Group Pool 9:15 M.R.H. B/P 9:30 Arthritis Exercise 11:30 Lunch 12:30 Chair Yoga
15 8:30 Open Pool 8:30 Line Dancing 9:00 Rook Game 11:00 BINGO 11:30 Lunch 12:15 Silver Sneakers 1:00 Ukulele 2:00 Tai-Chi 4:15 Zumba 5:00 Yoga 7:00 Ball Room Daning	16 8:30 Card Playing 9:15 M.R.H. B/P 10:30 Smile On 65 11:00 BINGO 1:00 Computer Class	17 8:30 Group Pool 8:30 Card Playing 9:00 Zumba 10:00 Acrylic on Canvas 10:30 Line Dance 11:30 Lunch 12:00 Mens Pool Class 12:15 Silver Sneakers 2:00 Tai Chi	18 8:30 Card Playing 8:30 Open Pool 10:00 Womens Pool Class 10:45 Presentation on Caption phones provided by social services 11:00 BINGO 11:30 Lunch 1:00 Ukulele	19 8:30 Canasta Tournament 8:30 Group Pool 9:30 Arthritis Exercise 11:30 Lunch 12:30 Chair Yoga

How to Track

Create a spreadsheet with:

- **Name of Facility**
- **Address**
- **Column for City -** to sort easily
- **Point of Contact** - Name, title, email, phone number
- **Facility Type** - in separate column for easier sorting
- **Notes Section for your ideas/plans**



Document your visits, calls, and what you've dropped off. If you call and leave a vm, note a future date/time to call back.

Prepare

Put dates and times on your calendar in advance - consistency is 100% required!

Create a system for follow up

Plan your stops the day before - **Road Warrior app** will plan route



Marketing Assets

- Business cards, name tag, agency branded apparel
- Compliant flyers, rack cards, etc.
- “Goodie” bags and other give away items - pens, small notepads, etc.

First visit

Don’t take any sales material first visit

- Take business cards, a pen and notepad, goodie bags
- Find a way to provide value first
- Pick up a business card of the person you speak with along with a copy of their newsletter, etc.
- If a Sr. Center or appropriate place for volunteering/playing games, ask if they are looking for volunteers (call Bingo, other games)
- If appropriate place for a seminar or speaker, ask if they would be interested in having you in to provide education (M101)or do a talk (can partner up with a financial planner, or other COI in community.



Send a handwritten Thank You card after your visit!

Follow up Visits

- Consistency is 100% required! You are building a relationship!
- Have to go back and stop in regularly - I recommend once a month
    - Create a way to keep track of when you visited, what you dropped off, who you spoke with
    - Find ways to provide value and be a Resource
    - Go back to the places where the door is opening
- Take flyers and giveaways on subsequent visits
- Look for community boards and ask to put up business card, flyers (tear off flyers)
    - Grocery stores, convenience stores, fitness centers, diners, laundromats, etc.

Community Partner Events/Tabling Events

Be on the lookout for Community Events/Tabling Events

- Senior Health Fairs
- Tabling - Laundromats, Food Pantry, Provider offices, locally owned Pharmacy, Dentists, Eye Dr's, Gyms, Farmer's Markets, etc.

Tabling "set up"

- Table and table drape
- Business cards and PTC cards
- Flyers
- Pens and other giveaways (ask carriers)
- Candy
- Signage - banner
- "Spin" wheel



Participating in Tabling Events

- Have your tabling set up ready to go
- No chair!
- Don’t be on your phone or computer, you’re there to engage and talk with potential clients
- Have candy, giveaways, and a Spinner Wheel to draw attention and engage attendees
- Have a raffle - make sure compliant!
- Be a resource - answer questions and have a conversation before you ask for PTC

Educational Seminars

A great way to grow your name in the community is to hold educational events in your area.

- M101's, Understanding LIS, Retirement planning, Doc talks, etc.
- Benefits CheckUp - Aetna has a program/website in partnership with NCOA
    - https://aetnamedicare.benefitscheckup.org/
- Partner with other COI - Financial Planners, Dentists, Eye Dr's, Chiropractors, Will and Trust Officers, Bankers, Doctors, Diabetes Association, Alzheimer's Association, County Extension Offices, P & C Agents
- Set up a "series" of talks monthly
- You can hold events at a Library, Senior Center, Dr. offices, YMCA, or Restaurants.
- You can hold educational events Online as webinars
- Use flyers, direct mail, and social media to promote the event

Sponsorship Opportunities



Walking Clubs

Pickleball Tournaments/Leagues

Senior Walk/Run events

Senior Bowling Leagues

Produce giveaway events

Senior Health Fairs

Senior Center “day trips”

Local Chamber Events

Social Media

- **Connect with Seniors on Social Media**
  - Facebook is the fastest growing social media platform that Seniors use with over 60% of seniors in the US on Facebook
  - It's one of the best places to find and connect with Seniors online
  - Put yourself out there as a RESOURCE first, don't be "salesy"
  - Cost-effective way to market
- **Create a Business FB Page**
    - Stay compliant!!! Look for compliant posts from carriers/upline
    - Be generic and general - no plan specifics
    - Make posts educational - ex: M101, Community Resources/Events
    - Post pictures of yourself in the community doing events, and invite them to upcoming events

Referrals from Current Clients

- Send Thank you Notes after each sale
- Send Birthday Cards (Spark program)
- Stay in touch with current clients (Spark program)
- Ask for referrals after appointments- “If you feel like I did a good job finding a Medicare Plan for you, here’s some business cards. I would really appreciate you giving them to any friends or family who could use my help.”
- Reach out to your book with a “referral request card”.

It has been a pleasure serving you. If you know of anyone looking for similar services, please have them contact me!

_____

_____

_____

Agency Name/Logo
email & phone number

Specializing in Medicare Senior Products

Tips for Success

- Consistency is 100% required
- Don’t give up
- You’re selling yourself first
- “Servant” minded - Serve first, provide value first….before asking for sales
- Build relationships, get to know people
- Establish yourself in the community- become the “go to” for Medicare

“When it comes to success, consistency is key. Consistent hard work leads to success. ”

— Dwayne Johnson

Resources

Resources

- Carrier Broker Managers
- Carrier Websites - compliant handouts, social media posts
- Community Boards/FB pages
- Library
- Spark Platform
- Upline support - your direct upline or Spark pam.harrison@sparkadvisors.com



Questions?

Spark

Thank you!

Pam Harrison

Medicare Trainer & Compliance Lead

pam.harrison@sparkadvisors.com

