Spark

Medicare Marketing

Hosting an Educational Event

Pam Harrison

Medicare Trainer & Compliance Lead



May, 2024

Agenda

01	Why Educational Events?
02	Finding a Space
03	Preparing & Promoting
04	Presenting
05	Follow Up

CONFIDENTIAL AND PROPRIETARY

What Educational Events?

- Part of your Grassroots Marketing strategy - from the “ground up”
- Great way to establish yourself as an “expert” in your community
- Cost Effective
- Easy to get started
- Service orientated - less “salesy”
- Build relationships

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

Finding a Space for your Event

Finding A Space

Where you Frequent as a Customer:

- Restaurant with a meeting room- helps attendance if you provide food! ($15 per person)
- Country Club
- VFW
- Church/faith based organization

Where your target audience hangs out:

- Senior Center/Community Center
- Library
- Bingo Hall
- Restaurants
- Fitness Centers/YMCA
- Local colleges

Centers of Influence/Affinity Partners:

- Financial Planners
- CPA's
- P & C Agents
- Provider Offices

Things to keep in mind

- Is there a cost to use the space?
- Is the space equipped for a presentation? (TV/projector, seating, parking, ease of getting in and out)
- Is anyone else doing something similar in the location?
- Does the venue have a way to promote the event internally? (newsletter, FB Page, Bulletin board)

Current CMS Rules prohibit a marketing event from occurring within 12 hours of an educational event in the same building or any adjacent buildings.

Preparing for your Event

Preparing - The Topic

The Presentation - M101(Medicare 101). This is the most common educational topic and Spark has M101 you can get personalized.

Other Options:

- Educational session on LIS/Extra Help
- Part D - detail about tiers, phases, insulin savings, etc.
- Check Carrier portals for compliant presentations - Humana has “programs in a box” for example.
- Partner with another business in your community and let them share their expertise - financial planner, P & C agent, Accountants, Dentists, Chiropractors, Alzheimer’s association, etc. Could offer a “series” of talks.

If you create your own educational presentation, make sure it’s compliant! Send to Spark at least 30 days ahead of time for review and approval.

Preparing - Giveaways

Items to give out:

- Small notepads and Pens
- Business Cards
- Informational Handouts
- Permission to Contact Cards
- Other small giveaways - pill box, chip clip, jar opener, etc.
- Small bottles of water and snacks if not at a restaurant



Business Reply Card

First NameLast Work Phone
Licensed agent Email

First/last name: _____

Phone number: _____

Best day and time to call: _____

Email address: _____

Mailing address: _____

City: _____ State: _____ Zip: _____

I verify that the contact information entered is correct and is my personal information and that I am over 18 years of age.

By providing my contact information, I agree to allow a licensed sales person to contact me regarding Medicare options or to enroll in a plan. I understand that the person who will be discussing plan options with me may be compensated based on my enrollment in a plan. Not affiliated with the U.S. government or federal Medicare program. We do not offer every plan available in your area. Any information we provide is limited to those plans we do offer in your area. Please contact Medicare.gov or 1-800-MEDICARE to get information on all of your options.

MULTIPLAN_BR2_0423_M

Keep your giveaways low cost to be compliant with CMS gift rules!

Promoting your Event

Promoting your Event

With your Venue: Can your venue advertise for you through:

- Their newsletter
- Their community board/calendar
- Their Social Media pages
- Their Staff



Your own Media:

- On your website
- On your personal and business social media pages
- Ask your family and friends to share and repost
- Create an event on your Business FB Page

Promoting your Event

Word of Mouth

- Take event flyers to
  - Senior Center(s)
  - Other Centers of Influence you have built - financial planners, CPA's, P & C agencies, Chamber of Commerce
  - Local community boards - try grocery stores, laundromats, library



Traditional Advertising

- Direct Mail postcards/pieces can be a great way to promote your event-use Spark Mailers to make it easy!
- Run an affordable ad in a local newspaper
- Run a Social Media ad

Make sure to run ads/flyers through Spark Compliance!

Stay Compliant!

All educational events must be explicitly advertised as educational to beneficiaries.

Educational event ads and invites MUST contain:

- “For accommodations of persons with special needs at meetings call <insert phone and TTY numbers>.”
- “This event is only for educational purposes and no plan-specific benefits or details will be shared.”

If you stick with simply listing the name, time and place of your event, a flyer won’t need the TPMO disclaimer (next slide) since it’s “communications.”

Make sure to send to Spark Compliance prior to using.

TPMO disclaimers

You must add TPMO disclaimers to your email communications, website, marketing print materials, and other marketing materials for your event.

- If you do NOT market ALL plans in a service area:

  "We do not offer every plan available in your area. Currently we represent [insert number of organizations] organizations which offer [insert number of plans]products in your area. Please contact Medicare.gov, 1-800-MEDICARE, or your local State Health Insurance Program (SHIP) to get information on all of your options."

- If you market ALL plans in a service area:

  "Currently we represent [insert number of organizations] organizations which offer [insert number of plans]products in your area. You can always contact Medicare.gov, 1-800-MEDICARE, or your local State Health Insurance Program (SHIP) for help with plan choices."

Stay Compliant!

When conducting lead-generating activities, you must disclose to the beneficiary that their information will be provided to a licensed insurance agent to contact them in the future.

If communicating with a beneficiary-

- At an event: you must inform verbally
- Through mail: you must disclose in writing
- Through email, online chat, or other electronic communication: you must disclose electronically



Presenting at your Event

Set up the Room

- Dress appropriately - Business casual is best for most events - branded apparel is great!
- Get there early to set up room and make sure you have time to get your technology set up and tables/chairs arranged.
    - Make sure your presentation is visible on the screen
    - Arrange tables/chairs to maximize viewing and comfort
    - Arrange snacks/beverages attractively in a basket or tray
- At each place/chair, set out:
    - Notepads and pens
    - BRC/PTC
    - Business cards,
    - Informational handouts
    - Giveaways



You cannot require people sign in or give you their contact information. Attendees have to initiate.
You cannot give out SOA's at Educational Events, just BRC/PTC.

Give a great Educational Presentation

- Your goals are to inform and educate. You want to get them thinking about which options are possible choices for themselves, but also feel like you are the expert and it would be a good idea to meet with you.
- Spark's Medicare 101 Presentation is a GREAT way to present informative and compliant material. You can have it personalized to you
- You want your Medicare expertise to shine so practice ahead of time - spouse, friend, pet!



Make sure in your intro you reiterate that this is an educational event and you are not allowed to discuss plan specifics.

Wrap Up for Success

- Answer questions - make sure you just answer the question and don’t elaborate if they ask plan specific questions
- Offer assistance one on one - just fill out the permission to contact card in front of you or scan this qr code
- Thank them for attending!
- Be available after the seminar for questions - people who don’t feel comfortable asking something in the seminar will come up to you after - a great opportunity to connect!
- Clean up the room - leave it better than you found it!



Follow Up

Follow Up

Follow Up, Follow Up, Follow Up! It's the Key to Success!

Call the attendees who filled out BRC within 24 hours of the event to set appointment. They are interested!

If no answer, leave a message and then put it on your calendar to call back the next day.

Follow up 3-5 times, calling no more than once a day, but try different times of the day.

Try texting or emailing if they are not returning your calls.



"Success is almost totally dependent on drive and persistence. The extra energy required to make another effort or try another approach is the secret of winning."

-Denis Waitley

Don’t Give Up

Don’t give up!

- Keep them on your follow up list if they are not responding.
- Decrease frequency, but continue to follow up
- Provide value by sending them education/information by email or text on a regular basis(once a month).
- Keep you at the top of their mind!

Questions

Thank You

CONTACT

pam.harrison@sparkadvisors.com

Spark