Spark

Medicare

Grassroots Marketing









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Agenda

01	Why Grassroots Marketing
02	Plan & Prepare
03	Community Partners & Events
04	Client Referrals & Social Media
05	Tips for Success



Grassroots Marketing

What is Grassroots Marketing?

- 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

Builds Relationships



“People don’t care how much you know until they know how much you care.”
-Theodore Roosevelt



Plan & Prepare

Planning for Success



Brainstorm & 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 - Community

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
- Bowling Alley
- Chamber of Commerce

- Churches
- Goodwill (Senior Day)
- Golf Courses/Country Clubs
- Arts & Crafts Classes (Hobby Lobby, etc)
- Provider Offices
- Elder Law Firms that don't sell Medicare Plans
- HR Managers of companies

- Food Banks
- Local Public Transportation
- Laundromats
- Dollar Stores
- Breakfast Diners - go in at 10am
- Senior Bowling leagues/Pickleball
- Farmers Markets

Brainstorm - Your Connections

Your Connections

- 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

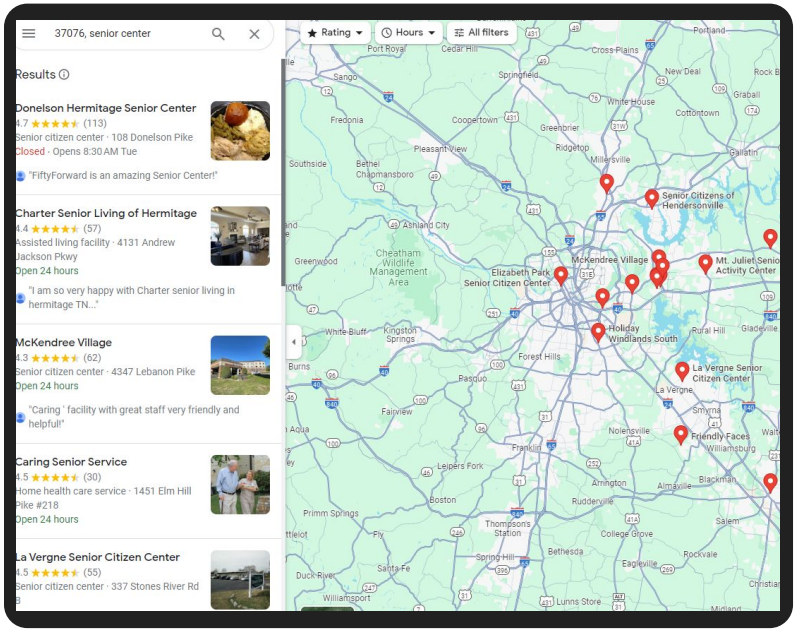
Ask your current clients where they go/who their contacts are.

- 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

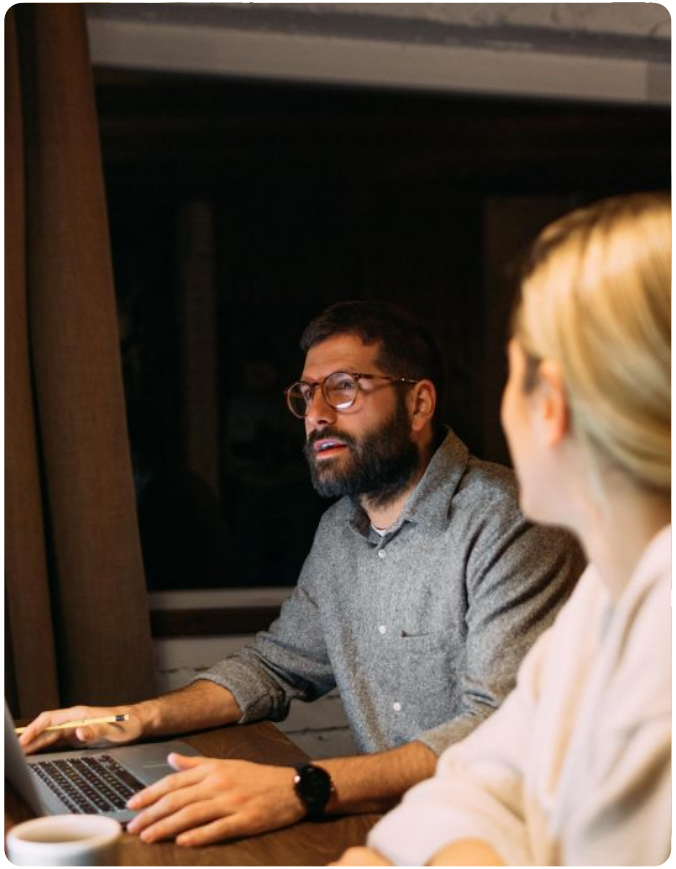
When looking at a potential partner website, keep in mind...

- **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.

Researching Locations

What to look for on the location 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



How to Track Locations & Visits

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

Preparing for your Visits

- 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.

Send a handwritten Thank You card after your visit!

Take business cards, 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.

Follow Up Visits

- Consistency is 100% required! You are building a relationship!
- Have to go back and stop in regularly - 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/Tabling Events

Be on the lookout for Community Events/Tabling Events

Senior Health Fairs
Laundromats
Food Pantries
Provider offices
Locally owned Pharmacies
Dentists
Eye Dr's
Gyms
Farmer's Markets, etc.

Tabling Set Up

Table and table drape

Signage/Banner

Business cards and PTC cards

Flyers

Pens and other giveaways (ask carriers)

"Spin-Wheel"

Tabling Events

Tips for Participating

- 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
- Network with other vendors

Educational Seminars

- 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

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

Collaborating with Community Partners

HEALTH MONTHS

Health Awareness Months

- February- Heart Month
- May- Arthritis Month
- June- National Safety Month
- July- Healthy Vision Month
- September- Healthy Aging Month

https://www.clinicaladvisor.com/news/health-awareness-months/

OTHER DAYS

Other Days

- May 15th- Bring someone flowers day
- July 8th- National Ice Cream Sundae Day
- August 21st- National Senior Citizen Day
- September 12th- Stand up to Cancer Day

https://www.listofnationaldays.com/

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 Medicare Beneficiaries on Social Media

- Facebook is the fastest growing social media platform that Seniors use with over 60% of seniors in the US on Facebook
- 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

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

_____
_____
_____

Agent/Agency Name & Logo
Email
Phone Number

Specializing in Medicare Products

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”.

Tips for Success

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

— Dwayne Johnson

- 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

Resources

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



Questions?

Upcoming Webinars

We hope you'll join us for another upcoming webinar:

- **5/28/25-** Client Retention Strategies
- **6/4/25-** Running an effective Seminar
- **6/11/25-** How to present a M101 Seminar
- **6/17/25-** The Life of a Lead
- **7/9/25-** Social Media Strategies

View upcoming webinars and register at:
https://lu.ma/sparkteam



Thank You

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