



Lessons Learned From Over 1 Million Events

GUIDE FOR MEDICARE AGENTS

medicareexperts@leadingresponse.com

(855) 978-0701

Before Your Seminar

THE PREP



1) THE PRESENTATION

This is where it all starts. A good seminar with a strong call to action on a marketable topic is key. Don't wing it here. Your presentation should already be vetted and tested by other agents or yourself. You start with the presentation because that dictates the other elements.

2) CHOOSE THE RIGHT VENUE

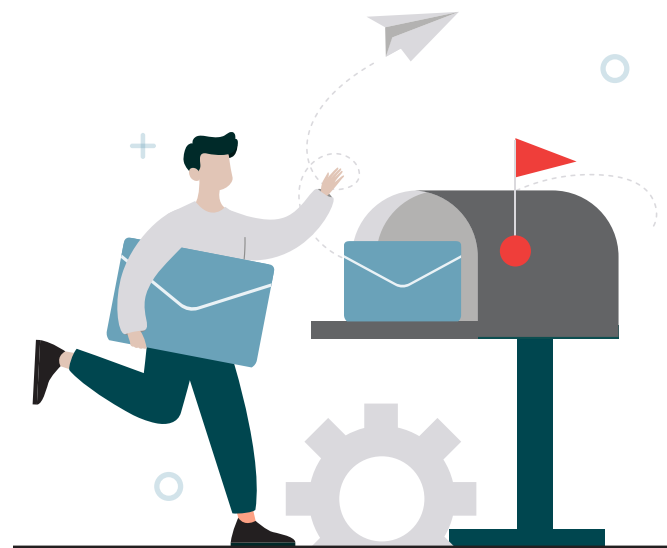
For dinner events, focus on restaurants. No country clubs, hotels, or banquet facilities. For events without dinners, libraries are ideal. The location should match the topic and the people you want to reach. It needs to be convenient to everyone being marketed. The venue should be an inviting, comfortable environment that everyone recognizes.

3) DATES AND TIMES

The right time and date is crucial. Sure, you would love to have daytime events, but they only get half of the response rate as evening events. Saturday mornings typically get even less. Tuesdays, Wednesdays and Thursdays are best at 6:30. You could even consider later, like 7:00, but not earlier. People will not leave work early to make your event.

4) YOUR INVITATION

This is a prospect's first impression. It should always feel professional. The content is even more important. Remember that what you want to discuss isn't nearly as important as what your potential responders want to learn about.



5) THE MARKETING LIST

The list is the foundation of your marketing campaign. Use the freshest and most accurate data you can get. Never try to save costs by reusing a list. If you are in a high net worth market, be very aware of the percentage of people who are ultra-wealthy. The ultra-wealthy may be less likely to attend events. When marketing those turning 65, know that you may need to extend past your preferred birth dates and eliminate any other demographic criteria.

6) DECIDING ON QUANTITY

It's better to have fewer dates with more people present. You need to have enough responders to create a buzz in the room. Having a room that seats 70 and only 10 people show up just feels awkward. A full room is the social proof people need to confirm that they made the right decision by attending.

7) DIGITAL OR DIRECT?

Both have advantages and disadvantages. Whenever possible, do both.

8) YOUR RESPONDER'S INBOUND EXPERIENCE

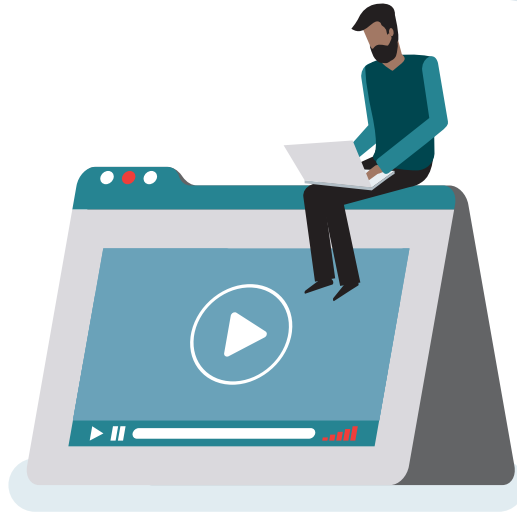
Many people aren't comfortable leaving their personal information on a voicemail. Most calls come in after working hours, so calls going to voicemail means abandoned calls and missed opportunities. Using your cell phone just makes you look like a one-person show. The responder's inbound experience should be an extension of their first impression. Using a professional call center and an option to register online helps you establish a sophisticated image and gives the impression of having staff, even if you don't.

9) REMINDER CALLS

Either you or your assistant should call 1-2 days before the event. Too early and they forget. Too late and they have already forgotten. You can even call when they initially make the reservation to introduce yourself and gently pre-qualify. Asking them their food choices is a great way to get a call back.



At the Seminar GAME DAY



1) TEST YOUR EQUIPMENT

Technical difficulties happen to everyone, but they always take away from the experience. Test all of your equipment on location and ensure you have backups, extra batteries, and alternative supplies. If using videos, make sure they load. Get to the venue early enough that you aren't fidgeting with your equipment as your guests are coming in.

2) PLAY MUSIC

It helps ease the awkwardness before the event and creates a more lively, social atmosphere.

3) COLLATERAL

Handouts also give your attendees something to do before the event starts. Include a bio about yourself. This gives you the chance to introduce yourself and tout your experience and accomplishments without potentially coming off as arrogant.

4) STAFF

If possible have someone other than yourself do check ins. Attendees will feel that you are more established if you have an "assistant" that helps you. If this person helps with the reminder call process, appointments and follow up, even better. Some people have their spouse help.



5) WHO DOES THE PRESENTATION?

You **MUST** do your own presentation. Other people can be a part of it, but they can't outshine you. It is critical that you are the person seen as the expert. It is better for you to do an imperfect presentation than for someone else to do a perfect presentation for you.

6) THE POWER OF INTRODUCTION

If this is your manager or an authority figure in some way, that's great. It can even be your "assistant" that did your check ins. It doesn't matter who introduces you, just that it isn't you. This person can list your experience and credibility without you having to do it.

7) KNOW YOUR STUFF

Know your presentation down pat. The best presenters don't even have to look at their slides.

8) BE HUMAN

Introduce your family, hobbies, interests or volunteer work. Tell some of your personal story. People like to work with people they like, and they must know you to like you. Talk about your family, interests, hobbies and what makes you, you. There is such a thing as being "too professional".



9) THE GOAL

To get your responders to know, like and trust you enough to set an appointment with you. That's it.



10) GET PERMISSION TO CONTACT THE NIGHT OF THE EVENT

Starting with the 2024 enrollment season, CMS will no longer allow agents to set appointments at their educational events or do Scope of Appointments. You can collect Permission to Contact forms at your event and follow up the next day. You are allowed to set appointments at sales events.

11) CONSIDER INVITING YOUR CLIENTS

It may feel counter-intuitive, but they warm up the room and create trust among your other responders. They are often your biggest advocates, may offer up testimonials and will shut down anyone who attempts to poison their table with negativity or heckle you.

After the Seminar

THE FOLLOW UP

1) CALL THE NEXT DAY

Reach out to everyone the next day after your seminar. Remember the principal of declining intent. Even if they want to set an appointment with you, the longer that goes by, the less likely they will do so.

2) OPEN UP YOUR CALENDAR

Try to set appointments as quickly as you can. The sooner, the better. The further away their first appointment is, the more likely they are to cancel it.



3) SEND THANK YOU CARDS

We can all be better with that, right? Have you ever received one and not appreciated it? We should really listen to our grandmothers. They were right.



4) INVITE THEM TO OTHER EVENTS

People who like to go to seminars like to go to seminars! When you inevitably lose touch with some, host another event on a different topic and invite them. Do this on a bi-yearly or quarterly basis and consider including clients and other professionals such as Estate Planning Attorneys, Pre-Need Specialists, and Financial Advisors.

5) DON'T GET DISCOURAGED

People often attend seminars well before they are ready to make a big decision. They are trying to educate themselves and make sure that they are set up for success. Expect some accounts to take time and don't get discouraged when they do. Remember that you are in it for the long game.

6) DRIP MARKETING

Stay in touch and top of mind with newsletters and emails. Your FMO or marketing agency can likely help with this.

Medicare marketing strategies have changed, and so must your business. Our team has the experience, knowledge, and expertise to get you in front of the right prospects, in the right way, at the right time.

LeadingResponse has facilitated more seminar events in the financial and insurance industry than any other marketing agency. Many of LeadingResponse's senior marketing consultants have facilitated more events single-handedly than some competing firms.

Expanding your financial business is easier when you work with an experienced partner to generate leads. We fill educational seminars with Medicare eligibles and those preparing to enter the Medicare landscape. We connect consumers to experts for life's big decisions.

Our Medicare marketing solutions are backed by years of experience, proven techniques, and successful strategies that put you in front of the ideal audience. As the experts in consumer engagement in the Medicare industry, we're here to provide coaching, guidance, and feedback that can propel your success.





Ready to Get Started?

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