



# AEP Marketing Guide



# AEP 2024 Marketing Guide / Checklist

It is time to start marketing for AEP 2024 October 15th- December 7th, 2023! Learn how to leverage Spark's tools and resources like Marketing Center, Sources page and Spark's Client Retention program, this AEP to grow your business.

Below you will find various marketing guides for every campaign you want to run for this AEP.

## Spark Client Retention Program

Are you opt'd into Spark's **free** client retention program that sends automated marketing materials in your branding to your clients and prospects during AEP?

Learn more about the marketing campaigns and opt'd in **HERE** you do not want to miss out on marketing to your clients and prospects free of charge this AEP.

### 2024 Client Retention AEP Guide



**Spark**

### Client Retention Program

Improve your client retention without lifting a finger! We'll send emails and postcards, in your brand, to your clients throughout the year. Once you opt-in, all of your clients will automatically receive the following engagements:

- The 1st of each month: New Plan Enrollments**  
The beginning of a new policy is crucial for retaining new clients to your book of business. We'll send a postcard and two emails over the course of the first month of their coverage to confirm they have their Summary of Benefits and ID Card.
- The 15th of each month: Client Newsletter**  
The Spark team curates lifestyle newsletters that will be emailed to your clients on your behalf and are a great way to stay top-of-mind and provide value for your clients.
- Early September: AEP Campaign**  
We'll route a survey campaign to all of your enrolled clients. We invite clients to complete an AEP survey, so they can share any updates to their health profile in advance of AEP.
- Birthday Cards (at-cost)**  
Two weeks before your client's birthday a handwritten birthday postcard will be sent to your clients. Cards are \$2.50/card and are billed quarterly.



Alan,

Thank you for choosing me to handle your Medicare insurance needs. By working with me, you not only get a plan but a team to help you with your healthcare needs.

**ELISA RODRIGUEZ**  
(512) 555-9876

**HERE'S WHAT TO EXPECT NEXT:**

- An enrollment letter from [Carrier Name], verifying enrollment in your plan
- A letter with your ID card and summary of benefits

You can always reach out if you have any questions!

**ACME MEDICARE USA**

RETURN TO:  
ACME MEDICARE USA  
1234 W 5TH ST  
AUSTIN, TX, 78703-4321

ALAN WEST  
987 MAPLEWOOD AVE  
AUSTIN, TX, 78722-1234

# AEP Social Media Marketing

Are you looking to expand your digital marketing footprint with social media? Spark has an in-depth social media guide whether you are just starting social media pages or looking to run paid ad campaigns.

## Social Media Marketing Guides:

- ◆ Setting up social media pages
- ◆ Social Media Strategy
- ◆ Social Media Ads
- ◆ AEP Content Calendar

## AEP Social Media Assets



## AEP Email Marketing

Have you been hoping to up-level your marketing by trying email marketing to your clients and prospects? Check out our free resources for email marketing and custom templates you can use via Spark Marketing Center.

[Email Marketing Guide](#)

## AEP Direct Mail Marketing

Do you want to send an additional mailer to clients or prospects this AEP? Check out our guide on direct mail and the new eye-catching designs Spark has created for AEP.

[Direct Mail Marketing Guide](#)

## AEP Event Marketing

Are you looking to host your first AEP event or learn how to level up your events this year? Check out Spark's event marketing guide and top-of-the-line marketing assets to reach your attendance or sales goals from your event.

### AEP Event Marketing Guide

- ◆ Educational vs. Informal Sales Event
- ◆ Marketing your event
- ◆ Marketing at your event
- ◆ **Event Timeline / Planner**

### Marketing Event Assets:

- ◆ Social
- ◆ Mailer
- ◆ Flyer
- ◆ Medicare 101s

## Marketing to Providers **during AEP**

Have you been looking to expand your partnerships and learn how to sell yourself to providers in your local market? Spark's sales and marketing team have created a guide and materials to help you leverage Sparks resources and a script to help you gain provider relationships.

### Provider Marketing Guide

#### Provider Marketing Assets:

- ◆ Provider Deck
- ◆ Mailers
- ◆ Flyers
- ◆ Social Media
- ◆ Medicare 101 Brochure

## Marketing Medicare to ACA / Life BoB **during AEP**

Do you have other lines of business that you also want to sell your Medicare services to? These clients already trust you with other coverage, now find the best strategies to let these other lines of business know you are here to help them with Medicare coverage this AEP.

### Marketing to your ACA or Life BoB Guide

#### Marketing Assets:

- ◆ Social
- ◆ Mailer
- ◆ Flyer

## Looking for a specific AEP marketing campaign you did not see? Or wanting to create **custom marketing materials**?

Learn more about the Spark Marketing Center for custom assets you can create yourself from our templates or from scratch [HERE](#)

Or reach out to the Spark marketing team at [support@sparkadvisors.com](mailto:support@sparkadvisors.com) to request custom marketing material (\$75 per page of custom design)

## How to maximize your calendar this AEP to market your **Medicare business**:

### Strategy:

- ◆ The power of partnerships:
  - Providers, financial groups, lawyers, dentists, community groups, churches
- ◆ Digital engagements:
  - How to use your website, social media, email, and SMS to grow your partnerships and client base.
- ◆ Informative Marketing Materials
  - Medicare 101 brochure
  - Provider deck
  - Leave behinds


# AEP Return Mailer Survey

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## AEP Return Mailer

Please note the template grey boxes are for mailing



**Hello [First Name],**

I hope all is well. As you may know, the Annual Enrollment Period for your Medicare coverage is just around the corner. During this period, you have the opportunity to make changes to your Medicare plan that best aligns with your evolving healthcare needs. I wanted to get in touch with you to see if you expect to have any changes to your coverage years in 2024.

If you have a moment, please complete the following survey letting me know of any expected coverage needs. Please return the completed questionnaire to me utilizing the stamped envelope provided. If you would prefer to connect with me over the phone, feel free to call me at (###-###-###).

Once I've received your response I'll be reaching out to schedule an appointment to discuss your needs for the new year. Please note that the period to change your plan runs from **October 15, 2023, to December 7, 2023.**

If you have any additional questions or concerns, feel free to reach out.

I look forward to connecting with you.



**Jane Doe**  
 Licensed Insurance Agent  
 (555) 555-5555  
[jdome@sparkadvisors.com](mailto:jdome@sparkadvisors.com)

### Medicare Plan Review Questionnaire

Do you want to stay on your current plan this year?

☐ YES, I want to stay on my current plan  
☐ NO, my current plan no longer meets my needs

**If NO, what's wrong with your current plan?**

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**Do you have any new prescriptions?**

.....

**Do you have any new doctors or specialists?**

.....

**Do you anticipate your healthcare needs to go up this year?**

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**Is there anything else I should know?**

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