



Event Marketing Guide



Understanding the Essence of **Event Marketing** in Medicare

In Medicare, events are important to connect with prospects to either educate them or loved ones of beneficiaries on Medicare and their options to hopefully use you as their trusted agent. It is a great way to meet in person, establishing a relationship. As well as spread awareness of your agency and your business to expand your connections with beneficiaries, community members, medical groups, or carriers.

Educational Event:

During a Medicare educational event, you will be able to provide information about Medicare parts A,B, C, and D for Medicare beneficiaries and their caregivers. This event is not to sell but rather only to educate beneficiaries about their options.

During a Medicare educational event, you can present the Medicare 101 presentation provided by Spark. Use your QR code from the sources page on the Platform with your permission to contact to capture lead data in our Spark platform. You can also hand out business cards or informative resources for your attendees.

Sales Events:

Formal Sales Event:

In this type of sales event an agent can present a carrier-specific presentation to invited attendees.

Informal Sales Event:

In this type of sales event an agent would offer plan-specific information only by request while at a table, booth, or kiosk.

For formal sales events, agents must submit their presentations or talking points for approval to CMS and the applicable carriers.

Setting Clear **Objectives:**

Goals:

- ◆ How many attendees do you want to have at your event?
- ◆ How much marketing outreach do you want to do for event promotion?

- ◆ What group do you want to work with and establish a long-term partnership with?

Knowing Your Audience:

Unraveling the demographics, interests, and pain points of your target attendees.

Own your market and territory:

- ◆ What states are you licensed to sell in?
- ◆ Get involved with community groups and other small businesses
 - tax, accountants, financial advisors, lawyers, and realtors you can partner with to cross-promote your business with
- ◆ Who are you targeting?
 - t65, SNP, DSBP, LIS, or 65+
- ◆ Where is your target audience located, is the location of your event reasonable for your audience? Do you have a virtual option for those who cannot make it?

Event Budget:

Make the most of your resources while delivering an exceptional event experience. Anywhere from \$250-2500, you can create a great event and drive attendance. You can partner with a medical group or provider or carrier for event sponsorship to help with the cost. You can also have your upline or Spark help with the cost using your marketing co-op.

Example Event Budget breakdown:

- ◆ Marketing for your event:
 - Social Media posting \$0
 - Direct Mailer \$1000
 - Flyers to hand out locally \$50
- ◆ Location:
 - Event location - \$0 (if you partner with a local org or do the event at a medical group office you incur no venue cost.)
- ◆ Marketing materials at your event:
 - Medicare 101 presentation \$0
 - Medicare 101 brochures \$100
 - Snacks and beverages \$50
 - SWAG giveaways \$100
- ◆ Total cost: \$1,300

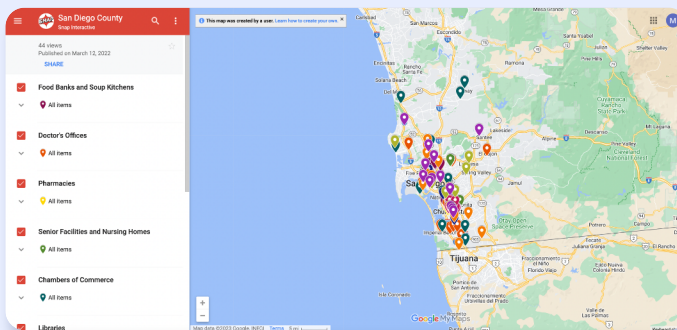
The Power of Partnerships

Building trust with community members or individual businesses you can partner with to cross-promote your businesses.

Example: A Medicare agent working with a financial advisor, Medicare agent sends anyone looking for financial assistance and promotes this business in their office while the financial advisor can help send people that are turning 65 in their clientele to you for Medicare assistance.

Where to find how to host an event:

◆ Spark Marketing Maps



Ideas:

- ◆ Local providers
- ◆ Veterans organizations
- ◆ Churches
- ◆ Libraries
- ◆ Retirement homes
- ◆ Foodbank

Why use community groups to partner with for your events?

Community involvement is crucial for shaping a positive brand image for several reasons. In today's interconnected world, consumers not only expect companies to offer quality services but also to be socially responsible and actively engaged with their communities.

Building Trust and Credibility:

Community involvement demonstrates a brand's commitment to making a positive impact beyond its bottom line. Engaging in charitable activities, supporting local initiatives, or addressing social issues helps build trust and credibility among consumers. Hosting an event with a community group that you care about and want to give back to can significantly help build trust with your target audience, Medicare beneficiaries, and other partners like doctors or additional community groups that you can partner with. When people see a brand actively contributing to the well-being of the community, they are more likely to perceive the brand as reliable and responsible, which are great brand attributes.

Enhancing Brand Reputation:

Positive actions within the community can lead to positive word-of-mouth marketing. Satisfied community members are likely to share their experiences with others, thereby enhancing the brand's reputation and creating a ripple effect of positive sentiment. As we know, word-of-mouth is huge in any service based industry but especially in Medicare. 13% of people solely use word-of-mouth recommendations when making healthcare decisions and drive \$6 trillion dollars for the healthcare system, that's right just off of word of mouth! *Visualvbyz. HubSpot shows that 75% of people don't believe the information placed in ads, yet **90% trust suggestions from family and friends**, and 70% trust customer reviews.

Positive Media Coverage and Publicity:

Meaningful community involvement initiatives often catch the attention of the media, leading to positive news coverage and publicity. Such exposure can amplify the agency's reach and create a favorable image in the eyes of potential customers. This is huge on social media and different community groups within Facebook or next door to help continue to promote your brand and events.

Long-Term Sustainability:

Agencies that connect in a meaningful and authentic way are better positioned for long-term success. Building strong relationships with local stakeholders and understanding community needs can help a brand adapt and remain relevant in changing market conditions and continue to hold events that will bring success to both groups.

How to reach out to **community groups or businesses to host an event:**

Get in contact with business owners, library representatives, church event contact, etc. Once you have the chance to get in contact with the right personnel explain how this can benefit them and their organization or business.

You may let them know how you can cross-promote their business to your clients. The event will cause both you and the partnered businesses/organization to also post on social media or team up on marketing materials to promote attendance for the event. Offer to pay for some of the marketing promotion: mailers, social media ads, flyers being printed, etc.

Embrace the Power of **Event Marketing**

Marketing is vital for both promotion of your event, your business, and building of partnerships. Whether your event is educational or a sales event you will want to ensure you have a set budget, are working on cross-promotion with your event partners (community organization, provider, library, etc.), and are utilizing multiple channels to market your event. Your goal should be to maximize your event attendees that will hopefully turn into sales.

Marketing for **your event**:

Strategy:

B2B Marketing and cross-promotion

Your goal is to gather the most attendees and leads from the event. Ensure you are cross-promoting the event with your partner (community organization, provider, financial group, library etc.) Try multiple methods to market your event, free and at a cost. Be sure to also offer your contact information to call instead of attending the event since some beneficiaries will be more included to do a 1 on 1 meeting in person or have a phone call vs. coming to an event.

Use the partnership to generate leads. Sell yourself as the expert in Medicare, offering a free meal or a raffle to entice prospects to attend your event.

Ensure consistent branding across all marketing materials. Create co-branded assets such as banners, landing pages, and social media graphics to reinforce the partnership for cross-promotion across all channels.

Use a mix of multiple marketing channels to amplify your event marketing:

- ◆ Direct Mail
- ◆ Social Media posting or Ads
- ◆ Print Marketing
- ◆ Emails
- ◆ Signage in the complex of the event

Collateral:

- ◆ Marketing Center > Templates > AEP > Event > Select Template

Marketing at **your event:**

Strategy:

Beneficiaries need to leave having your contact information and to use you as their trusted agent once they understand the options available to them. Try to speak with each individual at your event. Remember, Medicare can be confusing and they will likely have questions. Therefore, you will want to have your QR code with permission to contact, your contact info on multiple materials. You also want to ensure your logo, website, and social media are viewable that way clients have every avenue to reach you.

Execution:

- ◆ Medicare 101 presentation with your contact information and QR code, logo
- ◆ Large QR code printed on the
- ◆ Banners
- ◆ Business cards
- ◆ Permission to contact cards
- ◆ Printed Medicare 101s or brochures

Collateral:

- ◆ Marketing Center > Templates > AEP > Event > Select Template

Goal	Execution & Timeline
Book two events before AEP	Start now! <ol style="list-style-type: none"> 1. Create your marketing materials to go into local businesses and share your info: business card, flyer, brochure on your contact info and services. 2. Go into 5+ businesses a week to ask for a partnership and host an event with. 3. Once you have secured the location / partnership for the event start your marketing to prospects to invite to your event: flyers in local businesses, mailers, social media ads / posting, signage in the complex of the event. 4. Set your marketing budget: \$100-2000 5. Be sure to encourage the event partners to also market for the event and post on social media. 6. Notify your immediate upline about any events you are hosting
Reach 20+ RSVPs on your Lu.ma page	<ol style="list-style-type: none"> 1. Create your Lu.ma event page 2. Copy the RSVP link and create a QR code for all marketing materials and use the link to connect to the Lu.ma page when posting on social media, email, or website. 3. Start marketing 3+ weeks in advance of the event to get maximum exposure and increase RSVPs
Reach 10+ attendees at your event	<ol style="list-style-type: none"> 1. Have reminders and follow ups for RSVPs on the date and attendees - 1 week before, day before, day of 2. Be sure to have a virtual option or another way to contact you for those who cannot attend the event
Conduct 5+ sales at or after the event	<ol style="list-style-type: none"> 1. Have SOA ready at your event 2. QR codes with PTC at your event or PTC cards

Compliance Overview

Activity	Educational Event	Sales Event
File with CMS	No	Yes
Collect enrollment apps	No	Yes
Distribute Marketing Materials	Yes, if explicitly educational materials	Yes
Discuss plan specifics	No	Yes

Activity	Educational Event	Sales Event
Provide business cards	Yes	Yes
Distribute and collect SOA forms	Yes	Yes
Conduct lead generation activities	Yes	Yes
Meals or snacks allowed	Yes	Yes
Giveaways	Yes, under \$15	Yes, under \$15

Compliance for your **Educational Event**

- ◆ Your marketing materials must clearly label your event as “Educational”.
- ◆ Your marketing materials must also contain the disclaimer: “For accommodations of persons with special needs at meetings call <phone number and TTY number>”.

You can:

- ☐ Use sign-in sheets that clearly indicate providing contact information is optional.
- ☐ Provide meals or refreshments with light snacks. (Max \$15 combined nominal retail value, when combined with any other gift, must not exceed \$15 on a per-person basis.)
- ☐ Invite a provider to speak at the event.
- ☐ Collect lead cards and business reply cards.
- ☐ Hand out your business card.
- ☐ Call attendees after the event has concluded, as long as they give you written permission at the event.
- ☐ Obtain compliant permission to contact that is method-specific and event-specific.
- ☐ Ask attendees to fill out an SOA form for future appointments, if the consumer initiates the request.

Educational Events

Educational events must be designed to generally inform beneficiaries about Medicare, including Medicare Advantage, Prescription Drug programs, or any other Medicare program. Educational events are meant to provide generic, factual, non-biased information about different coverage options, rather than information designed to persuade beneficiaries to enroll in a particular type of plan (for example, MA–PD or Medigap), or in a plan offered by a specific organization.

The following requirements apply to educational events:

- Educational events must be explicitly advertised as educational
- Activities permitted at educational events:
 - Provide communication materials.
 - Answer beneficiary-initiated questions pertaining to MA plans
 - Make available and receive beneficiary contact information, including Business Reply Cards
 - Meals may be provided to beneficiaries, as long as the educational event meets all CMS regulations and falls under the CMS definition of communications
- Activities **not** permitted at educational events:
 - Market specific MA/PDP plans or benefits
 - Distribute marketing materials, including plan applications
 - Conduct sales/marketing presentations
 - Distribute or collect Scope of Appointment forms
 - Set up future personal marketing appointments

Compliance with your Sales Event

Sales/Marketing Events

Sales/marketing events are group events that fall under the definition of marketing.

- Activities permitted at sales/marketing events:
 - Provide marketing materials
 - Provide refreshments and light snacks to beneficiaries, as long as the items provided could not be reasonably considered a meal and/or that multiple items are not being “bundled” and provided as if a meal
 - Distribute and accept plan applications
 - Collect Scope of Appointment (SOA) forms for future personal marketing appointments; and
 - Conduct marketing presentations.
- Activities **not** permitted at sales/marketing events:
 - Require sign-in sheets or require attendees to provide contact information as a prerequisite for attending an event
 - Conduct health screenings, health surveys or other activities that may be perceived as, or used for, “cherry picking” or targeting a subset of members

- Use information collected for raffles or drawings for any purpose other than that; and/or
 - Providing meals to beneficiaries regardless of value.
- Invitations to educational events must clearly state “educational” and invitations to sales/marketing events must clearly state “sales” on the materials themselves.
- If advertising for both educational and sales/marketing events on the same material, the educational events must be clearly labeled as educational and details regarding the date, time and location of each event must be specific on the material, so it is clear when and where each event is taking place.
- Beginning September 30, 2023, sales agents may not schedule sales/marketing events to take place within 12 hours of an educational event at the same location. The same location is defined as the entire building or adjacent buildings.
- Educational information may be presented at a sales/marketing event, but the sales/marketing event must be accurately identified as sales/marketing.

With this Event Marketing Guide in your hands, you hold the key to educating and empowering Medicare beneficiaries that will elevate your brand and leave a lasting impression on your clients and partners. Get ready to unleash the power of experiences and unlock a new realm of possibilities for your marketing endeavors!

Please reach out to support@sparkadvisors.com with any questions!