

WELCOME TO SESSION 5

Marketing & Lead Generation

Today we'll explore proven marketing strategies and lead generation techniques to help you create more opportunities, connect with the right prospects, and grow your Medicare business.

TODAY'S ROADMAP

A clear plan for creating visibility, generating leads, and building a steady pipeline of Medicare opportunities.

01



Where Business Comes From

02



Community & Event Marketing

03



Digital & Paid Lead Generation

04



Turning Leads Into Appointments

05



Your Weekly Marketing Plan

06



Key Takeaways & What's Next



WHAT YOU'LL LEAVE WITH TODAY

- ✓ Multiple strategies to create more Medicare opportunities
- ✓ Proven ways to attract, connect and nurture the right prospects
- ✓ A system for consistent follow-up that sets appointments
- ✓ A simple weekly plan to keep your pipeline growing
- ✓ Resources and tools available to support your success



FROM MEDICARE KNOWLEDGE TO MEDICARE PRODUCTION

Knowing Medicare is only part of the equation.

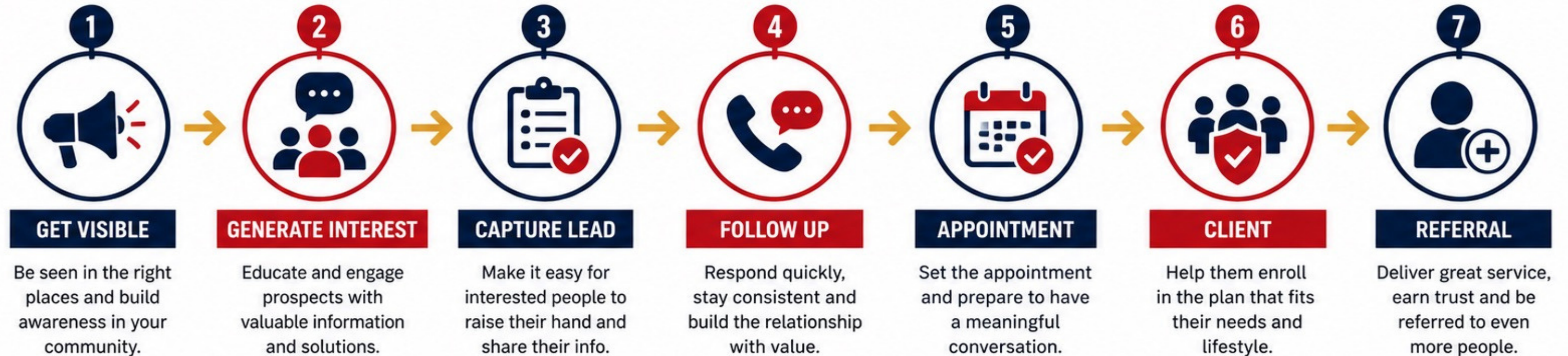
Successful agents consistently:

- ✓ Make themselves **VISIBLE** in the right places
- ✓ Create **VALUE** and build trust
- ✓ Start conversations and **GENERATE LEADS**
- ✓ **Follow up** and move leads into appointments
- ✓ Enroll clients and earn **referrals** for long-term growth



THE MEDICARE MARKETING & LEAD GENERATION SYSTEM

A simple, repeatable process that creates opportunities, builds relationships and grows your Medicare business.



CONSISTENCY + VALUE + FOLLOW UP = A GROWING BOOK OF BUSINESS

Focus on the process. The results will follow.

YOUR NATURAL MARKET: START WITH WHO YOU ALREADY KNOW

Some of your best opportunities already exist in your circle of influence.

- ✓ Family, friends and neighbors
- ✓ Former clients and business contacts
- ✓ Colleagues, vendors and professionals
- ✓ Community connections and organizations
- ✓ People who trust you and your advice



People do business with people they know, like and trust.



TURNING 65: BUILDING A CONSISTENT PIPELINE

Every day, thousands of people become eligible for Medicare. Be the trusted resource they find when it matters most.

- ✓ People turning 65 are actively looking for answers
- ✓ Plan ahead so you're visible before they enroll
- ✓ Build relationships with prospects early
- ✓ Educate, guide and earn long-term loyalty
- ✓ A steady Turning 65 strategy creates a steady flow of opportunities

TURNING 65 IN 2025

JANUARY	FEBRUARY	MARCH
3,200	3,100	3,400
APRIL	MAY	JUNE
3,600	3,500	3,700
JULY	AUGUST	SEPTEMBER
3,800	3,600	3,500
OCTOBER	NOVEMBER	DECEMBER
3,400	3,200	3,100

BE THE RESOURCE
THEY FIND FIRST.

REFERRALS: YOUR MOST VALUABLE LEAD SOURCE

Happy clients and strong relationships are the foundation of a steady stream of high-quality referrals.

- ✓ Focus on serving your clients with care and integrity
- ✓ Ask for referrals – most people are happy to help
- ✓ Make it easy for clients to refer their friends and family
- ✓ Stay in touch long after enrollment
- ✓ A referral today can become a client tomorrow

THANK YOU!

I truly appreciate your trust
and the opportunity to help.

If you know someone turning 65
or looking for Medicare options,
I'd be honored to help them too.

Referrals are the greatest
compliment I can receive!



CENTERS OF INFLUENCE: BUILD RELATIONSHIPS THAT CREATE OPPORTUNITIES

Connect with professionals and organizations who already serve Medicare-eligible individuals.

- ✓ Attorneys and estate planners
- ✓ Accountants and financial advisors
- ✓ Home health agencies and facilities
- ✓ Hospitals and discharge planners
- ✓ Transportation services
- ✓ Faith-based and community organizations



They know, like and trust their clients.
Become their go-to Medicare resource.



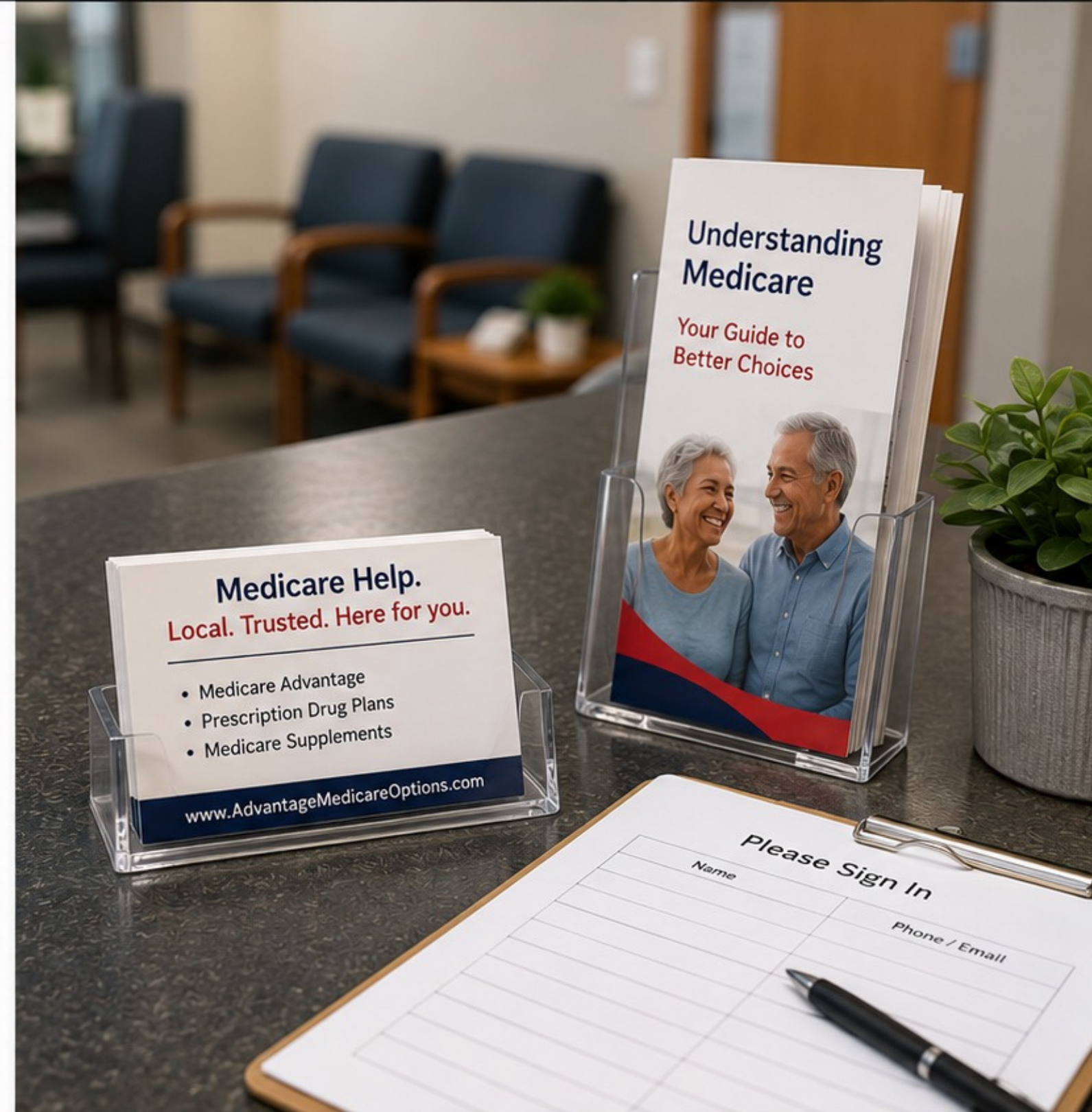
PROVIDER & MEDICAL OFFICE RELATIONSHIPS

Partner with providers to build trust, generate referrals, and serve your community.

- ✓ Visit local clinics and medical offices
- ✓ Introduce yourself and your services
- ✓ Leave business cards and resource materials
- ✓ Ask how you can be a helpful resource
- ✓ Offer to host a Medicare 101 for their patients
- ✓ Follow up and stay in regular contact



When providers trust you,
patients are more likely to trust you.



PHARMACIES, SENIOR CENTERS & COMMUNITY ORGANIZATIONS

These local resources connect with Medicare-eligible individuals every day. Build relationships that create referrals and open doors.

- ✓ Introduce yourself and learn how you can help
- ✓ Offer to provide Medicare 101 presentations
- ✓ Share educational materials and resources
- ✓ Ask about upcoming events or member meetings
- ✓ Become a trusted resource they recommend
- ✓ Stay engaged and follow up consistently



COMMUNITY EVENTS & LOCAL MARKETING

Get visible in your community. Show up, meet people, and start conversations that matter.

- ✓ Sponsor or participate in local events
- ✓ Attend health fairs, festivals, and community gatherings
- ✓ Set up a booth and offer helpful resources
- ✓ Use these opportunities to educate and connect
- ✓ Collect contacts and follow up
- ✓ Be a familiar, trusted face in your community



People do business with people they know.
Be present. Be helpful. Be remembered.



EDUCATIONAL MEDICARE EVENTS

Host or co-host events that educate, build trust, and position you as the local Medicare expert.

- ✓ Host Medicare 101 seminars and workshops
- ✓ Partner with COIs to reach more attendees
- ✓ Keep presentations clear, simple, and helpful
- ✓ Provide time for questions and one-on-one chats
- ✓ Collect attendee information for follow up
- ✓ Always follow up and continue the conversation



Educate first. Help always.
That's how you earn trust and referrals.



RETAIL OPPORTUNITIES

Retail locations give you access to high-traffic environments where you can start meaningful Medicare conversations.

- ✓ Partner with retail stores and pharmacy locations
- ✓ Set up in-store kiosks or information tables
- ✓ Offer Medicare plan reviews and resources
- ✓ Promote events and educational workshops
- ✓ Follow store guidelines and build strong relationships
- ✓ Be a helpful resource, not just a seller



Be where people shop.

Be the resource they remember.



MARKETING MATERIALS THAT SUPPORT THE CONVERSATION

High-quality materials help you explain Medicare clearly, build credibility, and stay top of mind.

- ✓ Use simple, easy-to-understand materials
- ✓ Provide take-home resources for prospects
- ✓ Keep your contact information visible
- ✓ Customize materials for your local market
- ✓ Keep materials current and compliant
- ✓ Use materials to start and continue conversations
- ✓ Professionally designed materials make a difference



**Good materials open doors.
Great conversations close them.**



BUILDING YOUR DIGITAL PRESENCE

Your online presence helps people find you, learn about you, and feel confident reaching out for help.

- ✓ Have a professional website or landing page
- ✓ Clearly explain how you help with Medicare
- ✓ Include your contact information and service areas
- ✓ Share helpful content that answers common questions
- ✓ Make it easy for people to contact you
- ✓ Keep your information accurate and up to date
- ✓ Build trust with a strong, professional online presence



Be easy to find. Be easy to trust.

That's how people choose to work with you.



SOCIAL MEDIA FOR MEDICARE AGENTS

Social media helps you stay visible, build relationships, and educate your community every day.

- ✓ Choose 1–2 platforms and be consistent
- ✓ Share helpful, easy-to-understand content
- ✓ Educate, don't just sell
- ✓ Use real stories and client testimonials
- ✓ Engage with your audience and answer questions
- ✓ Post regularly and stay active in your community
- ✓ Build trust by showing who you are and how you help



People follow people they know and trust.
Be real, be helpful, and stay consistent.



DIGITAL ADVERTISING & DIRECT MAIL

Use the right mix of digital ads and direct mail to reach more people and generate more Medicare conversations.

- ✓ Target the right audience with digital ads
- ✓ Use clear, simple messages
- ✓ Promote events, plan reviews, and lead magnets
- ✓ Track results and adjust your budget
- ✓ Use direct mail to stand out in the mailbox
- ✓ Follow up after mailers to start conversations
- ✓ Stay compliant with all CMS advertising rules
- ✓ Test, measure, and keep improving



Reach them where they are.
Stay consistent. Stay top of mind.



PURCHASED LEADS & PRESET APPOINTMENTS

Understanding lead sources, expectations, speed-to-lead and why follow-up matters more than simply buying more leads.



COMMON PURCHASED LEAD SOURCES

- Medicare Event Sign-Ups
- Online/Web Leads (ads, forms, social)
- Direct Mail / Postcard Responses
- 3rd Party Lead Vendors



REALISTIC EXPECTATIONS

- Not every lead is a fit.
- Expect 5–15% to be high quality.
- Results come from consistent follow-up.



SPEED-TO-LEAD IS CRITICAL

- Contact within 5 minutes – 1 hour is ideal.
- Leads contacted in 1 hour are 7x more likely to have a conversation.



FOLLOW-UP MATTERS MORE THAN BUYING MORE LEADS.
Consistency, value and trust turn leads into appointments and enrollments.

PRESET APPOINTMENTS



What They Are

Pre-qualified prospects who have already expressed interest and agreed to a time.



Why They Work

Higher show rate, more efficient use of your time, and better conversations.



Your Role

Confirm, build rapport, ask the right questions, and present solutions.

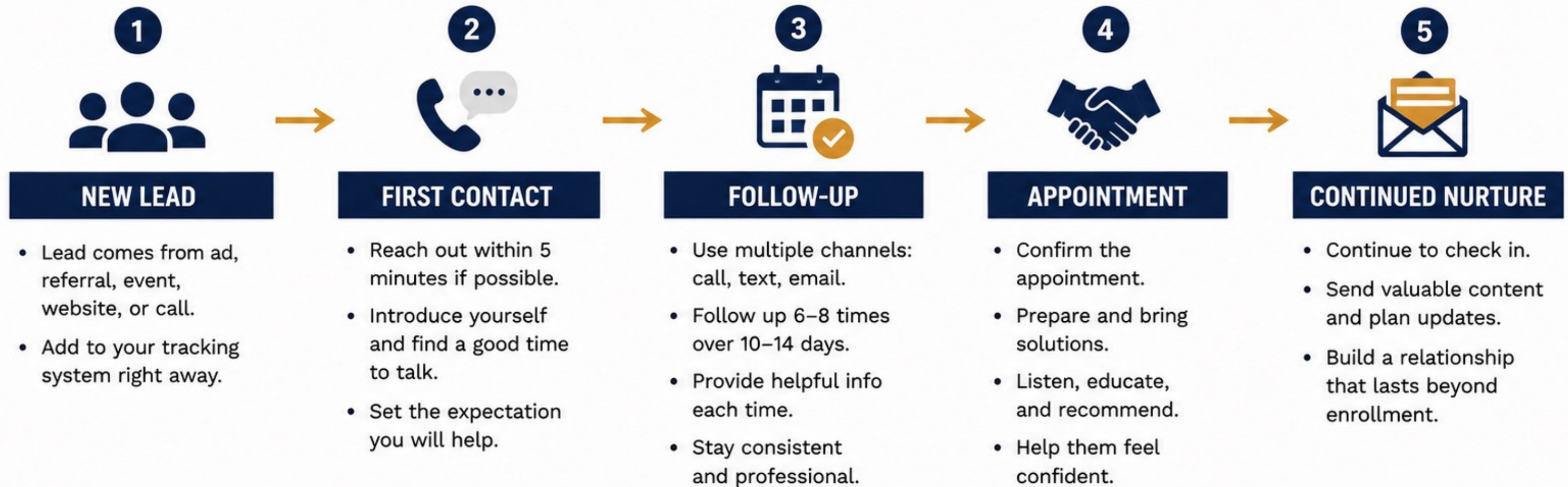
KEY TAKEAWAY

Good leads + fast response + consistent follow-up
= more appointments, more enrollments, more renewals.



THE LEAD FOLLOW-UP SYSTEM

A simple system creates consistent results.



CONSISTENCY WINS. Most “no’s” today become “yes” later.

WHY AGENTS **LOSE LEADS**

Leads don't go cold because they're not interested.
They go cold because the follow-up stops.



Too Slow to Respond

Waiting hours or days to reach out lowers your chances significantly.



Not Enough Follow-Up

Most agents give up after 1-2 attempts. It takes consistency.



Generic or No Value

If your message doesn't help, educate, or build trust, they tune out.



No Plan or System

Random follow-up leads to missed steps and lost opportunities.



Poor Lead Qualification

Spending time on leads who aren't a good fit wastes time and energy.



Assuming They'll Call Back

Most people won't call back. You have to stay in front of them.



Remember:

The agents who win are not always the best salespeople.

They are the most consistent.

BUILD YOUR WEEKLY MEDICARE MARKETING PLAN

A simple plan done consistently will grow your business.

1 CHOOSE YOUR FOCUS	2 PLAN YOUR ACTIVITIES	3 TAKE ACTION DAILY	4 ENGAGE & FOLLOW UP	5 REVIEW & IMPROVE
 • Pick 1–2 key activities for the week. • Focus on what will bring the best results.	 • Plan your content, outreach, and events. • Block time on your calendar. • Prepare your materials and messages.	 • Make your calls, send your emails, and post content. • Follow up with leads. • Stay consistent each day.	 • Respond quickly. • Follow up 6–8 times over 10–14 days. • Provide value and answer questions.	 • Review your results. • See what worked. • Adjust your plan for next week.
ACTION: Set your weekly focus.	ACTION: Plan it. Schedule it. Prepare it.	ACTION: Take action every day.	ACTION: Engage and follow up with your leads.	ACTION: Review, adjust, and improve.



SUCCESS TIP: Consistency beats perfection. Small daily actions lead to big results.

SESSION 5 KEY TAKEAWAYS & SESSION 6 PREVIEW

KEY TAKEAWAYS



Marketing creates opportunities.
Consistent marketing brings in leads.



Follow up with a system.
Speed, consistency, and value turn leads into appointments.



Avoid common mistakes.
Most leads are lost because of slow response or no follow-up.



Have a weekly plan.
Plan your activities, take action daily, and measure your results.



Small actions lead to big results.
Do the basics, stay consistent, and keep improving.

UP NEXT: SESSION 6



WHAT'S NEXT?

In Session 6, we will cover:

- ✓ Agent Compliance Essentials
- ✓ Protecting Your Business and Your Clients
- ✓ Building Strong Carrier Relationships
- ✓ Long-Term Agent Success Strategies



JOIN US FOR SESSION 6

Next week, we'll take it to the next level. **See you there!**

THANK YOU FOR JOINING US!

You've taken an important step toward building a successful and rewarding Medicare business.
Stay consistent, keep learning, and keep growing.



FOCUS

On the right activities
that bring results.



FOLLOW UP

Consistently and
with value.



HELP MORE PEOPLE

Make a difference and
build lasting relationships.



*Success in Medicare sales doesn't happen overnight,
but the right habits today create the results of tomorrow.*

NEXT UP: SESSION 6



TUESDAY, AUGUST 25
4:00 PM PT

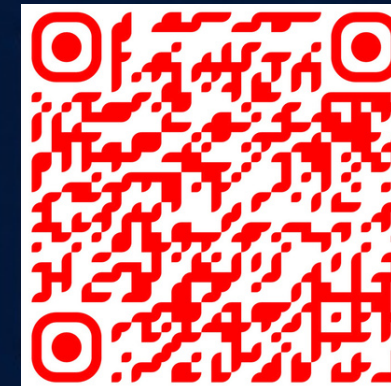


TOPIC

Agent Compliance, Protection
& Long-Term Success

REGISTER NOW!

Scan the QR code or visit the link below
to reserve your spot for Session 6.



SCAN TO REGISTER!

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