

Medicare Seminar Playbook for Agents



Program Includes

This seminar program is designed to generate highly qualified leads and fill your events with engaged prospects. Here's what's included:

Direct Mail Campaign

Targets 3,000 Turning-65 (T65) prospects in your selected area.

Digital Retargeting Campaign

Uses social media ads to retarget individuals who received your mailer—boosting visibility and engagement.

RSVP Capture

Prospects can register through:

- Phone
- Custom Landing Page

Landing Page Features

- Agent's logo, bio, and headshot
- Ability to capture Permission to Contact (PTC) during the registration process
- PTC is date- and time-stamped for compliance tracking



Getting Started: First Steps

Once you're ready to kick off your seminar campaign, follow these steps:

1. Book Your Venue

Contact restaurants, libraries, or community centers and reserve your dates at least 5–6 weeks in advance.

2. Fill Out the Setup Form

Complete the attached form with your business details so we can build your customer profile.

3. Send Us Your Information

Email us the completed form along with your confirmed event details (dates, venue, etc.).

4. Marketing Begins:

AcquireUp will begin creating your marketing materials and send them to you for approval.



Leverage LeadJig: Industry-Leading Technology Platform

Take advantage of LeadJig to track and manage your campaign from start to finish. With this tool, you can:

- View **real-time registrant data** including demographics and contact info
- Identify the **source of each RSVP** (direct mail or digital ad)
- Track confirmations, attendance, and no-shows
- Access comprehensive **analytics and reporting**
- Group attendees based on age, income, and other key indicators to optimize your in-room strategy



Educational vs. Sales Events: Which to Choose?

This is a common question—and your choice directly impacts results.

Educational Events (Recommended)

- Deliver the **highest response rates** across the country
- Prospects prefer to **learn and make informed decisions**, rather than be pitched a product

Sales Events

- Tend to have **lower turnout**
- During AEP 2024, over 3,800 events were held—educational events outperformed sales events **4 to 1**

Why?

1. Many carriers and medical groups already saturate the market with sales-driven messaging
2. Marketing a single carrier or plan may alienate some prospects
3. Seniors value the opportunity to **make choices independently** without pressure



Choosing the Right Venue

Top Venue Types:

Restaurants (Ideal for Medicare events)

- Proven venues include: Golden Corral, Red Lobster, Olive Garden, and local Italian favorites
- Tip: Think like a senior—where do your parents or grandparents enjoy going for Sunday dinner?

Libraries, Community Centers, Colleges

- Neutral locations that foster a more educational, less sales-oriented atmosphere

Offices or Hotels (Use as a last resort)

- These venues often feel too “salesy” and may reduce turnout



Best Days & Times to Host

Schedule between Monday and Thursday

- Use two different days (e.g., Tuesday & Thursday) to increase flexibility and maximize attendance

Recommended Start Times

- **Summer:** 6:30 PM
- **Winter:** 6:00 PM



Room Setup Tips

- Seat all guests **facing the screen** for clear visibility
- If using LeadJig, group attendees by age or financial profile to personalize your message
- Have **bread or salad served when guests are seated**—this keeps them settled and satisfied until dinner is served **after** the presentation to avoid distractions