

COMMUNITY ENGAGEMENT

AND HOW TO GET STARTED

About Grassroots Marketing

How Community Engagement Leads to More Opportunity

Grassroots marketing is a no-cost, organic lead generation strategy.

Allows you to establish local connections in your community to create new clients & help existing.

Ensures you establish yourself as a local subject matter expert.

Helps you become a familiar face in the circle that your prospects are in.



Laminating

Medicare ID Cards

This is a great way to get permission to contact forms & pass out business cards.

- Purchase a laminating machine (costs between \$50 - \$100)
- Create a sign that says, "Laminate Your Medicare Card for Free"
- Have giveaway items, business cards, and PTC forms available at your "booth"

Community Marketing Examples

Examples of locations

- Church functions
- Senior fairs
- Flea markets
- Community-wide yard sales
- Fall festivals
- Other community events

Local Pharmacy

Connections

This works best with small, independently-owned pharmacies.

- Introduce yourself with donuts & pastries
- Speak with the pharmacist & ask if you can sponsor their Rx bags
- Ask them if they have clients who cannot afford their prescriptions
- Share an example of how you helped someone afford their medication

Community Marketing Examples



Making Your Office Mobile in an RV

Using your RV offers you mobility & allows you to cast a wider net using your portable office space. Check your laws on using your RV for business purposes.

- Confirm using your RV for business is not a local law violation
- Advertise anywhere and everywhere the day & time you'll be at a specific location
- Advertise LIS assistance & Medicare help as compliance allows
- Attend local events, tradeshow and community events



Community Marketing Examples

Making Your RV client-friendly

- Tear out/replace dinette
- Tear out/replace couch
- Use the bedroom
- Custom build a desk
- Convert the bunkhouse

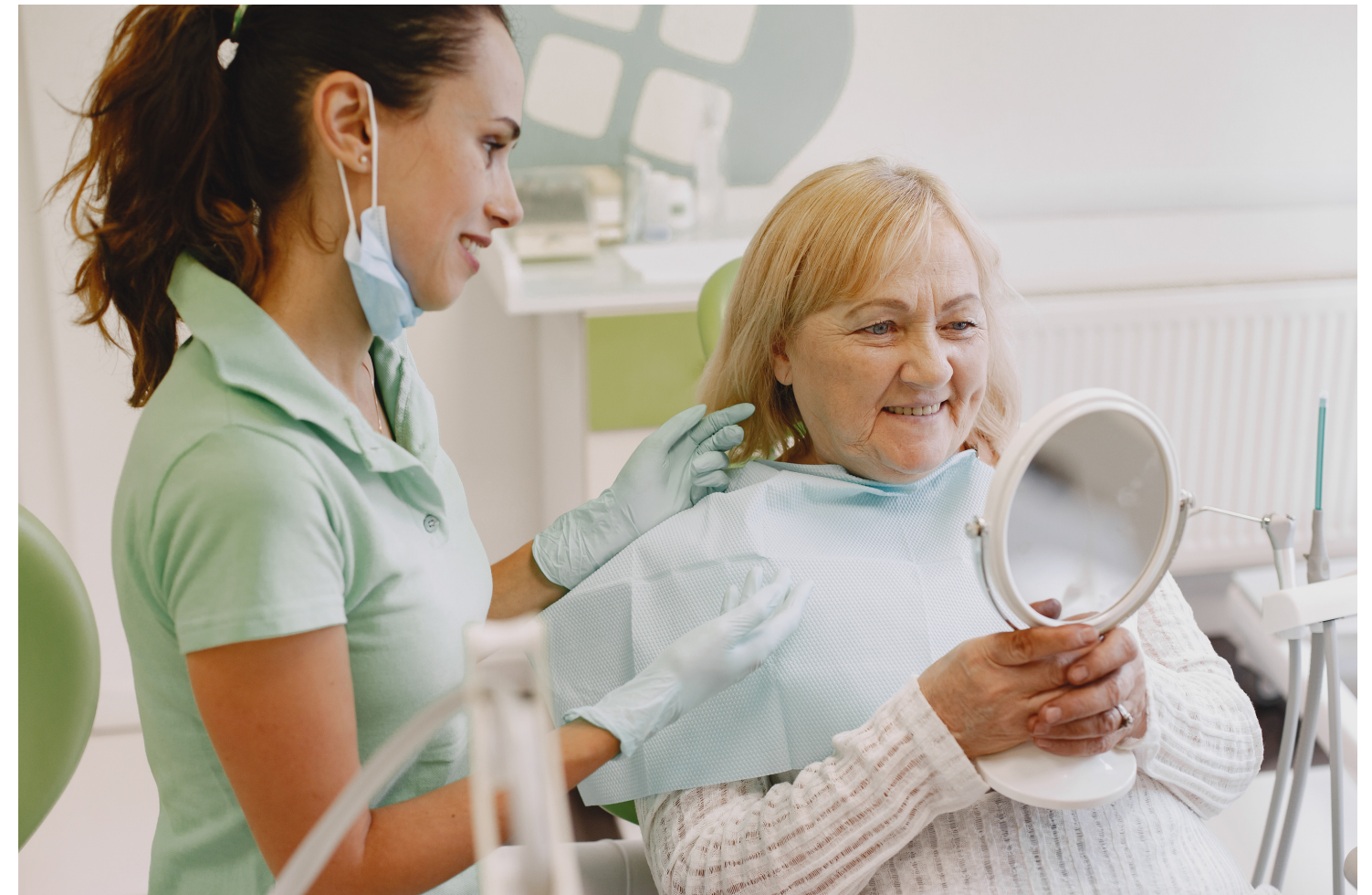


Dental Office

Partnership Opportunity

- Search Dentists accepting Medicare & Medicaid
- Introduce yourself with donuts & pastries
- Review dental portions of top MA plans
- Ask if they have seniors they turn away
- Show them how the dental benefits work to benefit client & dentist with billable services and additional funds from plans
- Leave behind business cards & follow up monthly

Community Marketing Examples



Pro Tip: Take a multi-channel approach by mailing a letter of intent for a partnership before visiting the office manager.

Tax Preparers

Partnership Opportunity

Community Marketing Examples

- Search Local Tax Preparers, Accountants, Tax Services or work with your local Chamber of Commerce
- Make contact with the office & request an appointment
- Have a presentation prepared showing how a referral partnership could benefit both parties
- Have a financial proposal ready
- Be sure to refer clients to them

Disability Attorneys

Partnership Opportunity

- Contact the attorney and offer to meet for a meal, or purchase an hour of their time to discuss their services
- Educate the attorney on how you could meet the insurance needs of their clients
- Educate them on the \$100 referral fee that is available

Community Marketing Examples

"What's in it for me?" Pitch

- Have a leg up on competitors by being able to offer insurance solutions through an agent
- Retention & referrals will go up as they now assist client's needs on multiple levels
- Disability clients will rely much more on attorney's practice for future business/needs

Veterans Benefits Coordinators

Partnership Opportunity

- Focus on groups where Veterans would go first to get support
- Other groups to consider are DHHR & Social Security Offices
- Plan a phone call or visit with the person in charge
- Go through the coverage of a Veterans MA-only plan

Community Marketing Examples

National Veteran Organizations

- American Ex-POWs
- American Veterans (AMVETS)
- Blinded Veterans Association (BVA)
- Disabled American Veterans (DAV)
- Korean War Veterans Association (KWVA)
- Marine Corps League
- Military Order of the Purple Heart
- Paralyzed Veterans of America (PVA)
- Retired Enlisted Association
- Veterans of Foreign Wars (VFW)
- Vietnam Veterans of America (VVA)

Food Bank & Soup Kitchens

Unique Opportunities

- Google search food banks in your area
- Visit their website & familiarize yourself with day(s) of operation, how many people they serve, and contact details
- Stop by and introduce yourself; ask how you can help
- Tell the coordinator about the healthy meals options, OTC benefits & transportation in MA plans
- Ask about volunteering & make a commitment to be there
- Ask to leave business cards and PTC forms

Community Marketing Examples

Hosting a Food Drive

- Contact the food bank to discuss a food drive
- Let the local newspapers & radio stations know what you're doing
- Create an event on Facebook
- Use local businesses as drop off locations to encourage/help create multiple partnerships

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Low-Income Housing and Senior Centers

- Connect with the administration to show them the benefits you can offer & how it helps residents
- The administrators can also help drive attendance to your events



Community Marketing Examples

Examples of events to host

- Ice cream socials
- Catalog parties
- Family move night
- Family game night
- Community art projects
- Coupon clipping parties
- "Senior" prom
- Bingo

Back-to-School

Backpack Giveaways

Many seniors are raising or helping raise their grandchildren. These individuals are also found in low-income areas.

- Work with carrier reps to support the effort (they usually donate a sizable number of backpacks)
- Ask people, businesses, and other organizations in the community to help supply donation
- Ask local businesses to be a 'designed drop off' location
- Advertise the event on social media by creating an event on Facebook

Community Marketing Examples

Some examples of essentials you need to collect:

- Wide & college-ruled paper
- Construction paper
- Crayons & colored pencils
- Highlighters & markers
- Gluesticks
- Pencils & pens
- Erasers
- Scissors
- Notebooks
- Index cards
- Rulers
- File folders
- 3-Ring Binders

Seminar & Workshop

Community Events

Community Marketing Examples

Seminars are still very popular with beneficiaries. Here are some topic ideas:

- Taking the Madness out of Medicare
- Understanding Your Social Security Benefits
- How to Stop Unsolicited Medicare Calls
- Basic Estate Planning
- What to Expect in Retirement: Healthcare Edition
- Navigating the System of Social Security Disability
- Taxes & Social Security in Retirement Strategy
- Planning Your Retirement
- ABC's of Medicare
- Veterans Benefits & Medicare
- Working Past Age 65 & Medicare

Ways to drive traffic to seminars:

- Leading Response
- Facebook event advertisements
- Direct mail invitations

Some ideas for event locations:

- Senior centers
- Faith-based organizations
- YMCA/YWCA