

# Medicare Sales Strategies: How to Build a Thriving Business



# The Goal:

## Build a Scalable, Referral-Driven Medicare Business

Success in Medicare sales isn't about chasing every lead—it's about **building a system that attracts clients, retains them, and generates referrals**. Whether you're just starting out or looking to scale, these strategies will help you create a **sustainable, profitable business**.

# 1 Leveraging Your Existing Network

Chances are, you already have a pool of potential clients—you just need to tap into it.

- + **ACA Clients** – Many will transition to Medicare when they turn 65.
- + **Current P&C or Life Insurance Clients** – A great source for Medicare cross-sells.
- + **Employer Group Plans** – Employees nearing retirement often need guidance on Medicare options.

### Action Step: Build Your Hot 100 List

Make a list of **100 people** you already know—family, friends, past clients, and business connections. **Prioritize those who are most likely to refer business to you.**

*"Marketing is the lever in your business. The more you invest in relationships and lead generation, the faster you'll grow."*



# 2 Referral-Based & Grassroots Marketing

## How to Build a Strong Referral Network

Some of your best leads will come from trusted professionals in related industries.

### Ideal Referral Partners:

- + Financial Advisors
- + Doctors & Pharmacists
- + Dentists & Chiropractors
- + P&C Insurance Agents
- + Elder Law & Disability Attorneys
- + HR & Employee Benefits Coordinators
- + Senior Center Administrators

### How to Stand Out:

- + **Give before you ask** – Offer referrals, education, and helpful resources first.
- + **Solve problems, not just sell products** – People refer professionals who provide real solutions.
- + **Be consistent** – A referral network takes time to build—start planting seeds now.

*"I position myself as a problem solver, not just another agent. If my referral partners have an issue, I help them fix it."*

### Tactical Steps to Build Strong Referral Relationships:

- + **Do your homework.** Call target offices as a “new patient” and identify their biggest pain points.
- + **Create a reciprocating obligation.** Help offices with prior authorizations, denied claims, or patient education.
- + **Follow up on every new client.** After enrolling someone, introduce yourself to their **doctor’s office and pharmacy.**

*"Your goal is to become a trusted resource, not just a salesperson."*

# 3 Hosting Educational & Community Events

## Event Ideas That Work:

- + **Medicare 101** – Break down Parts A, B, C & D in plain English.
- + **Medicare Jeopardy** – Make learning fun and interactive.
- + **How to Sign Up for Medicare** – Guide seniors through the process.
- + **Medicare Advantage vs. Supplements** – Explain the key differences.
- + **Long-Term Care Planning** – A great way to introduce additional products.

## How to Make Events More Engaging:

- + **Use a theme** – Seasonal or fun themes keep people interested.
- + **Wear a Medicare button upside down** – A quirky trick to get people to ask questions.
- + **Make it interactive** – Use games, raffles, and audience Q&A.

*"Educate first, sell second. When you make learning fun, people remember you."*

## Best Places to Host Events:

- + Libraries & Community Centers
- + Churches & Senior Centers
- + VFW Halls & Retirement Communities
- + Retail Stores & Pharmacies

## Best Places to Host Events:

- + **Promote at least two weeks in advance.**
- + **Require registration.** It improves attendance rates.
- + **Host in the morning.** Seniors are more engaged earlier in the day.
- + **Always have permission-to-contact (PTC) forms.**

# 4 Creative & Cost-Effective Marketing Ideas

- + **Seasonal Giveaways** – Branded items keep you top-of-mind.
- + **Bingo Nights & Mini Golf Sponsorships** – Low-cost community engagement.
- + **Senior Walking Groups** – A great way to build relationships over time.
- + **Free Movie Nights** – Hand out Redbox promo codes for a personal touch.
- + **Tech for Seniors Classes** – Teach email, social media, or online safety.
- + **Barbershop & Salon Sponsorships** – Cover haircuts and introduce yourself.
- + **Flea Market Booths** – Affordable and highly visible.
- + **Drive-Thru Coffee Giveaways** – Pay for someone's coffee and give them your card.

*"People remember experiences and generosity more than just another ad."*

# 5 Paid Lead Generation Strategies

## Direct Mail That Actually Works:

- + Seniors save mailers, making direct mail a strong long-term strategy.
- + **QR Codes** make it easier for people to request info instantly.

## Digital Marketing & Facebook Ads:

- + **80% of seniors use Facebook**, making it a prime lead source.
- + **Lead Generation Ads** collect name, phone, and email.
- + **Retargeting Ads** keep you in front of those who showed interest but didn't

## Cold Calling & Voicemails That Get Responses:

- + **Medicare Supplement** clients are still receptive to cold calling.
- + **Use short, direct voicemail scripts:**
  - *"Hey Steve, it's Matt. Give me a call back – (555) 123-4567."*
  - *"Hey Steve, I got the Medicare info you requested. Call me at (555) 123-4567."*

## Text Message Funnels:

- + Texts have a **93% open rate**, far higher than email or voicemail.
- + **Follow-up sequence for better engagement:**
  - **2-minute reminder text** after opt-in.
  - **15-minute follow-up email:** "We need three more details to qualify you."
  - **Phone verification call** to confirm interest.

## T-65 Locator App:

- + Maps out people turning **65 in your area**.
- + Monthly or annual subscription available.

## Seminar-Based Marketing:

- + **Dinner Seminar Events** – High conversion rates but cost about \$2,000 per event.
- + **ReminderMedia Magazine** – Get your face on the cover and mailed to prospects.
- + **Neighbor Referral Mailers** – "Your neighbor just enrolled in a plan..." (Creates FOMO).

## Radio, Newspaper, and Billboard Ads:

- + **Radio Ads** – Great for peak enrollment seasons.
- + **Billboards** – Expensive, but excellent for brand recognition.

*"Test different lead sources, track performance, and optimize for ROI."*



# 6 Follow-Up & Retention Strategies

## Small Personal Touches That Keep Clients for Life:

- + **Call on birthdays** – Even better? Sing them "Happy Birthday."
- + **Send birthday cards for their pets** – Unexpected and memorable.
- + **Quarterly newsletters** – Keep them updated with Medicare changes and health

## Go the Extra Mile:

- + **Attend client funerals.** It's about relationships, not just sales.
- + **Run referral contests. Make it fun**—clients must visit your office to claim prizes.
- + **Feature winners on Facebook.** Social proof works.

*"Loyal clients = more referrals = long-term success."*

## Final Thoughts: Build a Sustainable, Referral-Based Medicare Business

- + **Combine grassroots efforts with digital marketing.**
- + **Educate first, sell second.**
- + **Position yourself as a problem solver, not just another agent.**
- + **Use creative, low-cost marketing to stand out.**

*"Winning in Medicare sales isn't about selling—it's about **servicing, solving problems, and staying top-of-mind.**"*

**Which strategy are you starting with?  
Let's build your plan together.**



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