ICBN

NEXT LEVEL

WHAT COMES NEXT:

To Register or Not to Register

That Is the Medicare Question

These materials are intended solely for Medicare Insurance Broker training purposes and are not designed for use with clients.

ICBN
NEXT LEVEL

What's on the **Agenda**

- Define and document the key differences between Formal, Informal, and Educational Events
- Compliance requirements for each event type
- Best practices for hosting successful events
- How to leverage your pharmacy as a marketing tool
- Opportunities to collaborate with Broker Managers and carriers

These materials are intended solely for Medicare Insurance Broker training purposes and are not designed for use with clients.

ICBN
NEXT LEVEL

Why **Events** Matter

- Events are one of the most effective tools to generate leads, enrollments, and client loyalty.
- The pharmacy has a built-in customer base & connections to the community.
- Hosting events makes Medicare conversations organic and community-oriented.
- Events help you establish yourself as a trusted local expert.

These materials are intended solely for Medicare Insurance Broker training purposes and are not designed for use with clients.

ICBN NEXT LEVEL

Event **Overview**

Event Type	Intention	Able to Collect	Enrollments Onsite	CMS Registration	May be Sponsored By
Formal	Sell specific plans	PTC/SOA	Yes	Yes	Broker/Carrier
Informal	Generate leads Potential to enroll	PTC/SOA	Yes	Yes	Broker/Carrier
Educational	Unbiased Medicare information	PTC only	No	No	Broker/Carrier

These materials are intended solely for Medicare Insurance Broker training purposes and are not designed for use with clients.

ICBN
NEXT LEVEL

Formal Sales Events

Definition: Planned presentations focused on a specific Medicare topic, product, or plan type. Single carrier focus.

Compliance Requirements:
- Must be registered with carrier and reported to CMS
- Timeline: At least 10 days prior to the event

When:
- AEP: Great time – carriers fund, market, and drive attendance
- Non-AEP: Target populations eligible to enroll (e.g. T65, D-SNP, C-SNP)

Environment Tips:
- Host at accessible, community-friendly locations like pharmacies or senior centers
- Create a low-pressure, welcoming space

Pro Tips:
- Carriers sponsor the event & help advertise it via mailers, print ads, TV spots, or may provide leads
- You can only promote the sponsoring carrier's plans
- Bring alternate carrier sales materials so you're prepared if asked about another plan. Remember to step away from your booth.

These materials are intended solely for Medicare Insurance Broker training purposes and are not designed for use with clients.

ICBN
NEXT LEVEL

Informal Sales Events

Definition: Casual, engagement-driven presence where sales may occur like an info booth at a senior fair, Table set-up inside your pharmacy, Medicare Q&A table at a health clinic

Goal: Build relationships and capture lead or enrollment opportunity

Compliance Requirements:
- Must be registered with carrier and reported to CMS
- Timeline: At least 10 days prior to the event

Allowed Activities:
- Collect Scope of Appointment
- Take applications/enrollments
- Provide plan materials

Signage & Messaging:
- Use neutral, inviting signage: *“I’m a nice guy/gal. I answer Medicare questions”*
- Avoid promotional language unless carrier-approved

Pharmacy Strategy:
- Report your hours in the pharmacy as informal sales events (especially during AEP)
- Combine with flu/vaccine clinics for built-in foot traffic

ICBN NEXT LEVEL

Educational Events

Definition: Information-only events—Medicare or adjacent topics like Maximizing Your OTC Card Benefits, Understanding DSNP Benefits, Turning 65: What You Need to Know About Medicare

Compliance Requirements:

- No CMS registration required
- Cannot take applications or do plan-specific marketing
- May collect Permission to Contact

Pros & Cons:

+ Broader audience who may not want sales pressure
+ Lead generation opportunity
– May not be perceived as neutral if sponsored by a carrier

Advertising Rules:

- Do not state a licensed agent will be present
- Position as a value-driven community education opportunity

Pharmacy Tip: Use your OTC, diabetes, and immunization customer lists to promote events

These materials are intended solely for Medicare Insurance Broker training purposes and are not designed for use with clients.

ICBN
NEXT LEVEL

Pharmacy + Events = **Growth**

Why your pharmacy is a good venue:

- Constant foot traffic
- Trust with customers
- Easy to promote in-store and on receipts

Lead Strategy:

- Offer lead cards/Permission to Contact at register
- Medicare question drop box
- In-store flyers or posters with event info

Marketing Tip:

- Use your carrier broker Manager for co-branded advertising help
- Ask about co-op funds, mailers, or digital ads
- The more events you host = more recognition = more leads and support

These materials are intended solely for Medicare Insurance Broker training purposes and are not designed for use with clients.

ICBN NEXT LEVEL

Don’t Get Burned – **Stay Compliant**

- Beware what may seem like an “Educational” events from the pharmacy’s POV may in fact be an Informal Sales Event by CMS standards.
- **Rule of Thumb:** If you are discussing specific plans or collecting SOAs → it’s a sales event and must be registered.
- Keep events separate in purpose and advertising to stay compliant.

These materials are intended solely for Medicare Insurance Broker training purposes and are not designed for use with clients.

ICBN
NEXT LEVEL

All Events are **Worthwhile**

Type	Value
Formal	Potentially carrier-funded, full marketing potential, enrollment opportunity during AEP & Non-AEP
Informal	Year-round lead generation, low overhead, great for in-pharmacy engagement
Educational	Long-term trust-building, non-threatening way to reach early prospects

These materials are intended solely for Medicare Insurance Broker training purposes and are not designed for use with clients.

ICBN
NEXT LEVEL

Action Steps... **Getting Started**

Decide which event types fit your market & business strategy

- ✓ Identify upcoming opportunities (flu season, AEP prep)
- ✓ Connect with Broker Managers for support
- ✓ Add events to your marketing plan
- ✓ **Stay compliant – register sales events properly**

These materials are intended solely for Medicare Insurance Broker training purposes and are not designed for use with clients.

ICBN

NEXT LEVEL

Thank You!