



Medicare Summit Information – “How To” Manual 2019

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THE MEDICARE MARKET AND NEED FOR MEDICARE SUMMITS

Medicare is the federal health insurance program created in 1965 for people ages 65 and over, regardless of income, medical history, or health status. The plan was expanded in 1972 to cover people under age 65 with permanent disabilities. Today, Medicare plays a crucial role in providing health and financial security to 59 million older people and younger people with disabilities. The program helps to pay for many medical care services, including hospitalizations, physician visits, and prescription drugs, along with post-acute care, skilled nursing facility care, home health care, hospice care, and preventive services. Medicare spending accounted for 15 percent of total federal spending in 2016 and 20 percent of total national health spending in 2015.

In 2017, Medicare benefit payments totaled just under \$700 billion. Looking ahead, Medicare spending (net of income from premiums and other offsetting receipts) is projected to grow to \$11,159 billion in 2027.

About 10,000 people are now enrolling in Medicare every day. That's a record surge in Medicare enrollment, and it's expected to continue for the next 15 years, as the Baby Boomers age into their golden years. If current trends hold the CBO projects that 80 million Americans will be Medicare-eligible by 2035. It also means that the total number of Medicare beneficiaries is expected to double within the next twenty years.

As more Americans enter the Medicare-eligible market, more producers will be needed to service their needs **and a growth market for the insurance industry!**

As the Medicare market has been emerging for many years, NAHU recognized the need to supplement the information to Medicare agents in a unique and specific venue – **the Medicare Summit**. Local and State chapters from across the country are running successful Summits . Recruiting the Medicare-eligible market producer is a great way to expand and grow the chapter's membership. This is by far the most critical part of the planning/hosting a Medicare Summit for members in your chapter. Chapters across the country **that have been successful** have focused on broadening membership to the Medicare-focused producer.

Successful Medicare Summits are events filled with valuable knowledge, information, and access to vendors. Medicare agents will see the Medicare Summit as a must-attend event each year. **The goal is to give members valuable information but, more important, to reach agents who are not members of NAHU.** This is an added value of NAHU at the local level with a new audience.

Hosting a Medicare Summit is like most other events a chapter hosts during the year. All of the same elements of event planning are present. The critical difference is how chapters present partnership (sponsor) opportunities to vendors and **attract as many non-members as possible.**

It is essential to have a committee whose members are Medicare agents. We recommend that you have several NAHU agents from your chapter in addition to representation from major Medicare carriers and GAs. Ideas, feedback, input, and help are essential to making the event successful.

This instruction manual will give you the guidance and resources you need to plan, organize, conduct, communicate, and follow up on a Medicare Summit.

PLANNING/ORGANIZING/CONDUCTING A MEDICARE SUMMIT

Time Frame

It takes **about nine months** to plan a successful event. We recommend that you not plan a summit during Individual Market or Medicare open enrollment due to many people not being available for the event and because of the time commitment it will require from committee members - avoiding this conflict is essential. Holding the event in late spring through early fall is usually a reasonable timeframe for most. Save the date and partnership (sponsor) information should go out about five months prior.

Location

The host chapter will secure a location big enough for the event. Think of using a meeting room from a company, GA training area, hospital meeting room, hotel location or other venue space either rented or donated by a sponsor. The room size will determine the cap for attendees at the event. Locations for summits can vary based on the needs of your chapter. Destination venues are not recommended in the first year. Once the event becomes established, a destination venue could be more viable (out of the area).

Host committee

To be successful, a chapter should have a host committee who shares responsibility and offers different skills to the overall planning and running of the summit. One individual should be appointed as the chair of the committee to oversee that everything is assigned. A chapter may determine it is best to team up with another local chapter to combine resources and efforts. If more than one chapter is involved, at least (2) representatives from each of the host chapters should be on the committee. At least a few of the committee members should be familiar with the Medicare space. Although it is not required that all committee members be experts. This will be particularly helpful in selecting topics, speakers and knowing who to reach out to for sponsors and attendee invites.

It is up to the discretion of the host chapter as to how much help or involvement they would like from NAHU. NAHU will support the local chapter's efforts and provide assistance as needed and as our resources allow. Some examples of what NAHU can help with include: suggestions for topics and speakers; working with sponsors; sending out press releases; and working with our Medicare FMO and GA Principals Council to promote the event to their producers, as well as giving them exhibitor and sponsorship opportunities.

The First Planning Meeting

Gather **two** representatives from each of the chapters involved in the summit. The initial meeting should be **about 2 hours** to cover all the necessary materials.

After the initial meeting, your committee will meet once a month leading up to the event and then weekly/bi-weekly the final month before the event.

Things to cover in the first meeting include

- Mission and goals of the event
- Proposed date(s) for the event
- Decide on what kind of speakers your event will invite and what platform you will hold such as panel discussion versus breakout sessions
- Venue location
- Individual assignments (see below)
- Length of a summit and if it will include a break/ lunch

Individual Assignments to be determined during the first meeting

During the first meeting committee members should assign the following tasks to help move the planning process along. Some individuals may have to take on multiple roles depending on the size of the planning committee.

Overall Contact Person

This individual will help organize future planning meetings, send out mass communications to the committee, and take minutes of each session and follow-up on any assignments. This individual must be well organized and be willing to reassign things if someone is no longer able to fulfill their duties. This individual will be the main point of contact between the committee and NAHU as well as be the point of contact for all communications that go out to the masses.

Speaker point of contact

This individual will reach out to the potential speakers and invite them to be a part of the event. They will also be the point person to give any updates, schedule information and handle travel and hotel if necessary. This individual will gather the speaker's bio and headshot used in printed and digital materials. It is important to follow-up with speakers as the date approaches to make sure there are no changes or cancellations.

Outreach assignments

Assign each committee member with a list of carriers, hospitals and GA's to reach out to for potential sponsorships, exhibitors and attendees.

Registration

This individual will either work with NAHU or with another website to get registration up for the event. This will include posting all updated materials such as the agenda, meeting day/time/location, and pricing. Along with online registration, which is the preferred method, a paper form should be created (*see NAHU for template*) as well as flyers and sent to FMO's, general agencies, and carriers for their mailing lists and to be announced at local meetings and events. This individual will also handle the name badges, which NAHU can also help with the printing of if needed. They will keep a list of all those that have pre-registered or those that will register on-site if available.

Sponsorships

ALL committee members should be gathering sponsors. Once the verbal agreement is in place, the sponsor liaison steps in. ***NAHU can provide a template with different ideas for sponsorship and a sponsorship agreement***, but ultimately those determinations are up to the host chapter. NAHU can assist with the follow-up and contract. If the chapter wishes, NAHU will gather sponsorship payment, making sure the agreement is signed and following up about the sponsorship benefits provided such as complimentary registrations, ads for the program, company logos and all else needed per the contract.

Media Outreach and Advertising

Getting the word out about the summit is vital. You may include contacting hospitals, neighboring chapters, local agents, FMO's and publications. If you can get into a broker magazine or local paper to advertise the event you may negotiate coverage or ads in return for them having a booth or table at the event and including their logo on printed materials. A press release should be sent out to the local media which will be done by the Public Relations department of NAHU.

Location

This individual will be in charge of securing a meeting room and signing the contract if necessary. The entire committee should determine the location and look for potential "free" spaces from sponsors if available. NAHU can assist with suggestions of places, handling the agreement and other items that will be needed such as the room layout, food, and beverage, and making sure the appropriate A/V equipment is provided and set-up.

Program

With the help of the entire committee, a schedule will include the time frame, speakers, and topics. This individual will be in charge of creating and printing the programs, any flyers or other materials that will be available at the event. NAHU can also assist with the design of these materials. This individual will be in charge of applying for CE credits and contacting NAHU about including a Medicare Certification if your summit wishes to include those.

Registration

NAHU will assist with registration through the NAHU.org website should the host chapter wish to use that service. If the chapter decides to handle it on their own, they will need to provide a website link and the appropriate information so that the information can make it to the website.

Pricing (Registration Fee)

This host chapter will determine the fee based on the cost of the space, food and other expenses associated with the meeting. Sponsors can help offset the cost, but the goal of the sponsorships should be to generate revenue for the host chapter. Some chapters do recommend that the registration fee be the same for both members and non-members. This strategy aims at drawing as many non-members as possible to the event. Some have found that an additional incentive provided to non-members who join at the event has been successful to increased membership numbers. This meeting should be a terrific opportunity for recruiting new members. In general, most chapters are charging \$49 to \$59 per person.

Here is a sample registration form for attendees:

Thursday, April 12th

1:00 pm - 5:00 pm Free (w/ registration) 4 Hr LTC Refresher Course
5:30 pm - 7:30 pm Welcome Reception

Friday, April 13th

_____ 7:30 am - 8:30 am Registration/Breakfast – Networking with Sponsors
_____ 8:30 am - 10:45 am General Session – Market Overview/Leg Update
_____ 10:45 am - 11:15 am Break – Networking with Sponsors
_____ 11:15 am - 12:15 pm Breakout Sessions – Dual Market/Group Market
_____ 12:15 pm - 1:15 pm Lunch – Networking with Sponsors
_____ 1:15 pm - 2:15 pm Breakout Sessions – Senior Awareness/Tools for Agents
_____ 2:15 pm - 2:45 pm Break – Networking with Sponsors
_____ 2:45 pm - 3:45 pm Carrier Panel Discussion
_____ 3:45 pm - 4:45 pm Agent/Broker Panel Discussion
_____ 4:45 pm - 5:00 pm Closing Remarks – Prize Drawings

Please mark which of the sessions you plan to attend. Rooms are available at the Rosen for \$129/night. To reserve, go to www.RosenPlaza.com and use Group Code GRPFAHWM.

**Registration fee: \$49.00 per attendee until 3/28/18, then \$65.00.
Please include the name of attendee(s) on all checks submitted.**

Please provide the following information on all attendees.

Name _____
Company _____
Address _____
Cell Phone Number _____
E-mail address _____

Please make check payable to XXHU.

Mail checks and completed form to < Chapter Address> or complete this information to pay by credit card:

Name on Card _____ Billing Address _____
City, State, Zip _____ Visa _____
MasterCard _____ American Express _____ Discover _____
Card Number _____ Exp. Date _____

Forms with completed credit card information can be emailed to fahu@fahu.org or faxed to XXX-XXX-XXXX. If registering after X/XX/2019, please register onsite.

Attendees

While this is an event for a chapter and their members, **it is also a great way to promote new membership.** By working with sponsors to get the word of the event out to their people and the local media, it will provide an opportunity for the local and national membership to grow.

Some chapters have been successful in providing an incentive for joining at the event as a way to promote membership. This is commonly done by refunding the event ticket fee if they join on-site.

Other chapters have been successful in getting a "membership" sponsor that allowed the chapter to use the money how they saw fit to promote membership. Some ideas include a photo booth, a "win" wheel with prizes attached, candy bars and reimbursement for the summit ticket along with a ticket to a local lunch meeting in the future. It is at the discretion of the host chapter if it is feasible with funds. Regardless of whether this takes place, or not, applications for local and state chapters and a membership representative should be readily available.

After NAHU approval, the chapter is allowed to offer \$50 off of the new member's annual dues (this will come off the national dues portion – state or local dues remain intact). This must be taken care of during the event itself. Usually, a table is set up for membership purposes. NAHU will send a unique application for new members to use when joining from a Medicare Summit.

It is strongly recommended that the host chapter gather a list of agents to target who are not members of NAHU. A list of Medicare agents can be purchased from the state Departments of Insurance. Ask carriers, GAs, and FMOs to send the registration information to their agents, and you can reach the most significant number of Medicare agents in your area.

Topics

This will change from year to year as the industry adapts. Sought-out information/classes usually include information about Social Security, CMS, LTC, supplement selling, compliance issues, Medicare Advantage marketing, generating referrals, legislative updates from NAHU and prescription drugs. The host chapter should determine topics of the panel or tracks. Medicare general agents are helpful resources in selecting subject matter for the summit.

For larger meetings, it might be beneficial to break up the session in multiple tracks based on skill levels such as experienced agents and newbies.

Meetings hosted at the state level should include a representative from NAHU to talk about what is happening at a national level particularly on the regulatory and legislative side of things. NAHU has the most up-to-date information and can provide members with a look towards what will happen in the future. NAHU will work with the chapter to give this representative to be at the local summit. Copies of our current Medicare newsletter will be provided to give out to all attendees of the summit.

If the summit wishes to include CE credits, it will be the host chapter's responsibility to contact the appropriate people for that state and go through the process of applying for it. NAHU and the Professional Development department can assist with the appropriate steps to take.

If a chapter wishes to incorporate a Medicare certification with their summit, NAHU will handle that portion completely. This certification does have a cost associated with it but might be a nice incentive for those interested to do both the summit and certification at the same time.

Speakers

NAHU has a database of approved speakers that can be used by the host chapter to determine their agenda. For smaller meetings, it is recommended to hold a panel discussion with employees of various companies and backgrounds. These panelists could be from the sponsors, the local chapter, or larger organizations that work in the Medicare arena. Speakers can be found through local/regional carriers, FMOs (Field Marketing Organizations), and General Agents. If a sponsor is hosting a break-out session, it needs to be educational and not just commercial. All speakers and their content will need to be approved.

Sponsors

The host chapter of this event will be in charge of contacting and securing sponsors. Potential sponsors should form a relationship with the host chapter leaders to provide more than just monetary donations. Potential sponsors should be sought out from FMOs (Field Marketing Organizations), general agents, the Medicare divisions of companies and physician groups. This is a great way to diversify the sponsorships for your chapter. Generally, carriers have different funds set aside for Medicare products. You should approach carriers (Medicare Advantage, supplements) as well as FMOs, GAs and Independent Practice Associations.

Along with sponsorship money, the host chapter should arrange for sponsors to send out invitations to their employees and agents for the summit. This can be done through email communication, ads in their publications and on their website. The more people that know about the event, the more successful it will be, especially if a sponsor is inviting their people. These sponsors may have access to lists of interested persons that the chapter will not have.

Other sponsorship ideas include exchanging registrations for printed ads, meeting space or hosting the food and beverage. Sponsorships will traditionally be determined by the host chapter based on what the chapter will provide and what they will get in exchange.

Asking the right person at the organization is vital. Generally, the decision makers are the sales and marketing Vice Presidents. It is vital that the sponsors feel like they are receiving more than they are paying. It is how the messaging is handled and essential to the success of retaining quality partners each year. NAHU has a relationship with principal contacts for many of the FMOs around the country. Reach out for assistance.

High-end sponsors can bring in anywhere from \$3,000 to \$20,000 per event, depending on your location, number of agents attending and number of years the event has been occurring. It is a good practice to aim for the top five sponsorships to fully fund the event after five years.

Partners should be inviting their agents to the event via email, ads in their publications, etc. High attendance is crucial to successful events.

Here is a sample of sponsorship levels and benefits, and a sample sponsorship registration form:

Show Sponsor - \$6,000

- Two Exhibit Tables
- Priority placement of table location
- Ten attendee registrations to event + 4 staff registrations
- Recognition on promotional materials
- Honorable mention from the podium and State newsletter recognition
- Banner Ad on the FAHU website
- Opportunity to Provide Speaker for the Program
- (3 available until agenda is complete)

Lunch Sponsor - \$5,000

- Exhibit Table
- The preferred placement of table location
- Eight attendee registrations to event + 3 staff registrations
- Honorable mention from the podium and State newsletter recognition
- Opportunity to make the 5-7 minute presentation at lunch
- (1 available)

Breakfast Sponsor - \$3,000

- Exhibit Table
- The preferred placement of table location
- Five attendee registrations to event + 3 staff registrations
- Honorable mention from the podium and State newsletter recognition
- Opportunity to make a 3-5 minute presentation at breakfast
- (1 available)

AV Sponsor - \$2,500

- Exhibit Table
- Four attendee registrations to event + 2 staff registrations
- Honorable mention from the podium and State newsletter recognition
- (1 available)

Thursday Reception Sponsor - \$2,000

- Exhibit Table
- Three attendee registrations to event + 2 staff registrations
- Opportunity to make a 2-3 minute presentation at the reception
- (2 available)

Name Badge Sponsor - \$1,500

- Exhibit Table
- Two attendee registrations to event + 2 staff registrations
- Logo printed on attendee name badge/holder
- (1 available)

Registration Sponsor - \$1,500

- Exhibit Table
- Two attendee registrations to event + 2 staff registrations
- Sponsor signage at Registration Booth
- (1 available)

Refreshments Sponsor - \$1,250

- Exhibit Table
- Two attendee registrations to event + 2 staff registrations
- Sponsor signage at break
- (2 available)

Exhibitor - \$750

- Exhibit Table
- Two staff registrations

Thursday CE Sponsor - \$500

- Table outside of CE classroom on Thursday afternoon
- Recognition on promotional materials
- (2 available)

**Questions regarding sponsorships or want something you don't see? Contact
(your contact information)**

(Your Chapter) Medicare Summit – Month XX-XX, 2019

Sponsor Registration Form

Company name: _____
Product/Service: _____
Contact name: _____ Title _____
Phone: Office (____) _____ - _____ Cell (____) _____ - _____
Email: _____
Address: _____
City _____ State _____ Zip Code _____
Onsite Coordinator name: _____ Title _____
Phone: Office (____) _____ - _____ Cell (____) _____ - _____
Email: _____
Sponsorship level: _____ Cost: \$ _____
Additional attendee registrations _____ x **\$49 each** = \$ _____
Total: \$ _____ **or whatever you are charging)**

Payment mode: ____ Sending Check payable to XXHU ____ Credit Card
Name on card _____
Credit Card # _____ Expiration Date _____ CVV Code _____
Billing address _____ City _____ State _____ Zip _____
Signature _____ Date signed _____

Submit to

(Your Chapter)
(Address)
(City/Town, ST, Zip)

Summit Agenda

Here is a sample agenda:

Medicare Summit Agenda

Thursday, April 12, 2018

1:00pm-5: 00 pm 4 Hour LTC Refresher CE Course or NAHU Medicare Certification Course
5:30pm-7:30pm Welcome Reception

Friday, April 13, 2018

7:30am-8:00am Registration & Breakfast with Sponsors
8:00am-8: 30 am General Session – Welcome and Overview - FAHU President – Steve Israel
8:30am-9: 20 am Medicare Market Overview and Professional Development -1CE hour
 Presenter – Dwane McFerrin
9:20am-9: 35 am Break/Networking
9:35am-10: 25 am Centers for Medicare & Medicaid Services and Legislation – 1CE hour
 Presenters – Janet Trautwein & John Greene
10:25am-10: 45 am Break/Networking
10:45am-11: 45 am Insurance Carrier Panel Discussion, Moderated by Bob Tretter – 1CE hr.
 WellCare, United American, United HealthCare, Aetna (see questions pg. 15)
12:00pm-1:00pm Lunch with Exhibitors
1:00pm-1:50pm Breakout Sessions A: 1 of 2 Options -1CE hour
 Option 1 - Dual Market of Medicare and Medicaid, Presenter - Al Clancy
 Option 2 – Medicare in the Group Market - Presenter – Kathy Burton
1:50pm-2:00pm Break – Networking
2:00pm-2:50pm Breakout Session B: 1 of 2 Options – 1CE hour
 Option 1 – “Senior Ethics / Increase Your Awareness” Presenter – Theresa
 Cubillas Russell
 Option 2 - Tools available to the Medicare Agent, Presenter – Keith Giles
2:50pm-3:00pm Break – Networking
3:00pm-3:50pm General Session – Agent Panel Discussion – 1CE hour
 Panelists: Darry Schroader, David Raymond, Laura Kimble, Michele Malooley
 Moderated by: Steve Israel
3:50pm-4: 30 pm Medicare and Senior Market Insurance Products - 1CE hour - Presenter –
 Darwin Hale
4:30pm-5:00 pm Five Steps to Building a Professional Practice - Presenter – Gary Owen
5:00pm-5:30pm General Session – Closing remarks - Prize Drawings

We suggest that for the first year hosting an event, the agenda be kept to a one-day (or even half-day) event. Chapters that have organized multiple years have moved to a two-day event that includes product training and certification. Start small and grow the event.

Agendas should include time for NAHU-focused activities and discussing the value of membership. Be sure to focus on the value of the association for the agent and being involved with your local chapter. Successful agendas do include both general session speakers for all attendees as well as breakout sessions.

Breakout sessions can be done in many ways, but most chapters have found that having two breakout tracks that focus on basic (new agents) and advanced (seasoned agents) topics is the most successful format for a summit.

Sample Questions for Carrier Panel

A very popular segment of the Medicare Summit is a carrier panel. A carrier panel is usually made up of 3-4 representatives from different carriers that market Medicare products in your area. This particular panel involves front line sales consulting – you will find that it is easier to get sales managers than the carrier top executives on your panel. Here are some sample questions that can be used in this setting – but please ask the most pertinent questions you can:

1. The components that make up a person's Medicare coverage, Parts A, B, C and D, and how they coordinate together, is very confusing to most consumers. In 3 minutes or less, how do you explain Medicare's 'alphabet soup' to your clients?
2. What 'pitfalls' or potential issues, problem areas or shortcomings do you point out to clients transitioning to Medicare?
3. One of the most confusing and problematic areas in the Medicare realm is prescription drug coverage. In 3 minutes or less, how do you explain Medicare Part D's 'doughnut hole' to your clients?
4. Ten years ago, when Medicare separated their drug coverage from medical coverage, the program was designed to help people who reach the catastrophic phase the most, paying 95% of their drug costs after an out of pocket max. Today, because of advances in high-cost specialty drugs, patients with arthritis, cancer, hepatitis C or other complex conditions may still have tens of thousands of dollars in cost-sharing. What advice can you give a client who approaches the donut hole or perhaps even the catastrophic drug phase? And what do you think the future holds for the Part D benefit and pharmaceutical companies?
5. Most Medicare Advantage HMO plans include a drug benefit, and monthly premiums are generally considerably less than Medi-Gap PPO plans. How do you explain the difference between HMO and PPO, and help clients choose? Or often asked, "which is better, HMO or PPO?"
6. What is the process for a client to change from a Med-Sup Plan to an Advantage Plan, and when can they do so? Conversely, what if they want to switch from an Advantage plan to a Supplement Plan?
7. Explain how it works if a client wants to change plans, or from one carrier to another, is there underwriting involved? Please include guidelines for Birthday Guaranteed Issue, time frame, or any applicable pre-existing conditions clauses.
8. When coming off an employer plan and the client is Medicare eligible, can the individual sign up for a Medi-Gap or Advantage plan on a guaranteed issue basis? If so, how long do they have to sign up? Also, what are the guidelines if there is a COBRA or an H.S.A involved?
9. Plan F, or Plan G or N - Other than the premium, what should the Agent consider when presenting these plans and what do you recommend? And how will your advice change after 2019 when Plan F goes away?
10. Looking to the future, what changes are in store in the next 3-5 years for Medicare health insurance? Your answers might include budget cuts, provider reimbursement model issues or changes, possibly ACO's? And how will the job of the senior market agent change?

(Closing Question)

What advice would you give an agent entering the senior market now? Do you offer training or lead program? What other assistance do you provide agents? Take this opportunity to share with brokers anything they should know about your company.

Revenue Sharing

If your chapter chooses to host an event with another, be very clear on expectations and outcomes. Equally sharing profits may not be in everyone's best interest if sponsorships raised and attendees are not equal. Consider drafting a "statement of understanding" that outlines expectations and profit sharing to avoid any confusion.

Need Advice – Resources

There are NAHU agents across the country that are willing to give you input on your upcoming events:

Dave Sherrill
Sherrill Insurance Brokerage, Inc.
407 CenterPointe Circle, Suite 1637
Altamonte Springs, FL 32707
Work Phone: 407-831-5000
Email: dave@sherrillins.com

Steven Israel
S. Florida Affiliated Health Insurers, Inc.
4204 Manor Forest Trail
Boynton Beach, FL 33436-8851
Work Phone: 561-249-3464

Yolanda Marie Webb
Webb Insurance Solutions
6117 Clover Ct.
Chino, CA 91710
Work Phone: 909-933-0891
Email: yolandaw1@outlook.com

Margaret Evelyn Stedt C.S.A.
Stedt Insurance Services
486 Calle Amigo
San Clemente, CA 92673-3003
Work Phone: 949-492-8213
Email: stedtins@cox.net

William D. Robinson
NewDay! Marketing
739 East Jackson Street
Martinsville, IN 46151-2033
Work Phone: 317-695-5683
Email: roadguy1950@hotmail.com

COMMUNICATION/FOLLOW UP FOR MEDICARE SUMMIT

Summit Communication and Follow Up

Within one week after the conclusion of the Medicare Summit, you should send out an email to all attendees. If you spoke at the meeting, reference that in your communication.

This is the very reason why you asked for the attendee's name, email address and phone number, among other things. Now you have their email address and phone number to communicate with them.

First, the email - here are some sample emails to use:

Sample Email to use for non-members attending a Medicare Summit sponsored by NAHU; Extend special \$50 off national dues offer

Subject Line: Special Offer to Join NAHU!

Good Afternoon Everyone:

Thank you for attending the ISAHU Medicare Summit. I hope you found the time well invested.

I want to talk to you about joining NAHU. It's your support of the association that allows us to keep you informed and ready to meet the health, financial and retirement security needs of all Americans through education, advocacy, and professional development.

As someone who works in the Medicare-eligible market, you know too well the regulations and legislation of this market. It is essential to be up to date and fully informed on the latest happenings. That is where NAHU becomes your advocate. We know this market, and they know us. It takes years of hard work to become an effective advocate, and we have been extremely involved in the Medicare-eligible market for the past 15+ years.

Because NAHU believes so strongly in the role of the producer, they are extending a special offer to you. Join NAHU by < > and get \$50 off the national dues!

Your NAHU membership has tremendous value - it is worth at least \$8,000/year. That's a return on investment of up to 20:1!

To join, click on the link: <https://nahu.org/membership/join-now>.

You can also call me at 202-595-7564 or 317-507-6387, and I will work with you to complete the membership application over the phone.

Again, thank you for attending the ISAHU Medicare Summit. I hope to see you at future NAHU events. Have a safe weekend!

**Sample Email to use for thanking those attending a Medicare Summit sponsored by NAHU –
No Special Offer Extended**

Subject Line: Thank You for Attending the XXAHU Medicare Summit!

Good Morning Everyone:

I want to take this opportunity to thank you for attending the 4th Annual ISAHU Medicare Summit on March 20th. Attendance increases every year, which is a testimony to the quality speakers and topics addressed at this Summit. The Medicare-eligible market is growing, and that provides an opportunity for you to grow your business and help those in need of your services.

NAHU has been and will continue to be extremely committed to the Medicare-eligible market. NAHU has a Medicare Advisory Group that works on your behalf, as well as a Medicare Principals Council that is a consultative resource.

This market is heavily regulated and legislated (as you know), and as such, you need an advocate working for you – to keep you informed and educated on the latest news and requirements. NAHU is that advocate. Our stated mission is to advocate for our members, provide professional development, and deliver resources to promote excellence.

If you are a member, thank you. It's your support of the association that allows us to keep you informed and ready to meet the health, financial and retirement security needs of all Americans. If you are not a member, please consider joining. The value of being a member is calculated to be \$8,000 on an annual basis. That's a return on investment of 20:1!

If you have any questions or concerns, please contact me at my email (btretter@nahu.org) or my phone number (317-507-6387).

Have a terrific weekend.

After sending out the emails regarding their attendance at the Medicare Summit, here is a phone track to use when calling the non-members that recently attended the Medicare Summit:

Sample phone track to a non-member who recently attended a NAHU event:

Good Morning/Afternoon, may I speak with < >? This is Bob Tretter, VP of Marketing and Recruiting at the National Association of Health Underwriters. How are you today?

Thank you for attending the <ISAHU Medicare Summit>. I hope you found the time was well invested. Events like that are just a part of what NAHU is all about. We keep you informed and ready to meet the health, financial and retirement security needs of all Americans through education, advocacy, and professional development.

I understand you are not a member, and that is the purpose of my call - I want to talk to you about joining NAHU.

Simply put, it's your support of the association that allows us to do what we do for our members every day. As someone who works in the <Medicare-eligible> market, it is essential to be up to date and fully informed on the latest happenings. That is where NAHU becomes your advocate.

There is strength in numbers, and we cannot accomplish what we have done and plan to do without the support of members nationwide. Will, you join us and become a member of NAHU?

(If yes, then take down their information or guide them to the NAHU website)

Final Thoughts

- The chapters that have had the most success are also the ones doing these the longest. One builds on another – don't just run one and be done!
- The ultimate goal of the Medicare Summit is new members! The Medicare market is growing and as more producers enter it, the greater the need for an association that has your back.
- Keep good records. This means accurate records of all the attendees, including any carrier reps or exhibitors. You will want to include them in your Summit follow-up emails and phone calls. You will also need to keep these for historical and reference purposes as you run these annually.
- Reach out to those who have done these successfully over the past few years. That list was in the "Need Advice – Resource" section. They can help!

Medicare Summits are a great idea because:

- They attract non-member producers and carrier reps who we can now recruit to join NAHU.
- The chapter will gain recognition in the insurance community for being a resource for Medicare-related issues and concerns.
- The event itself is mostly profitable – that depends on the sponsorships you are able to get as well as paying attendees. Obviously keeping costs down by getting local experts to speak also recommended.
- Did I mention new members and growth for the chapter?

If you have any questions, please contact Bob Tretter at btretter@nahu.org, or at 202-595-7564.

