



100

MARKETING

IDEAS

PARTNERSHIPS & REFERRALS

1

Join a local BNI or networking group.

2

Build referral relationships with financial advisors.

3

Collaborate with real estate agents working with downsizing seniors.

4

Network with CPAs who serve retirees.

5

Connect with funeral homes.

6

Get on preferred vendor lists for HR departments doing retiree off-boarding.

7

Partner with podiatrists, audiologists, or chiropractors.

8

Work with dental or vision clinics.

9

Partner with independent pharmacies.

10

Connect with physical therapists.

LOCAL COMMUNITY ENGAGEMENT

11

Host Medicare Scholars educational seminars at libraries or community centers

12

Offer “Medicare 101” educational nights at churches or senior clubs.

13

Partner with senior centers for monthly Q&A sessions.

14

Speak at Rotary or Lions Club meetings.

15

Run a “Medicare Checkup” event at a local pharmacy.

16

Volunteer for Meals on Wheels, local food banks, or other local charities.

17

Sponsor bingo nights or trivia nights at retirement communities.

18

Create or sponsor a local senior walking club.

19

Provide Medicare flyers at community bulletin boards.

20

Create leave behinds to collect info and permission to contact. Leave the cards at Starbucks and other coffee shops.

CONTENT & BRANDING

21

Design and promote a website on Google with a local business page.

22

Wear a “Ask Me About Medicare” t-shirt or hat when you go out grocery shopping.

23

Create a local Facebook group.

24

Market your services on Nextdoor as a LOCAL medicare agent.

25

Send seasonal and birthday mailers to local seniors.

26

Launch a “Senior Spotlight” series on social media - feature stories, interviews, or testimonials.

27

Launch a branded referral card or mini-flyer clients can pass along.

28

Write an article or guest blog for a local news site or magazine.

29

Design a printable checklist: “What To Do 6 MOonths Before Turning 65.”

30

Start a “Medicare Minute” weekly video series—quick tips under 60 seconds.

ADVERTISING

31

Run ads in senior-targeted print magazines.

32

Sponsor an ad with a local radio show.

33

Place branded bookmarks with Medicare tips in local libraries or senior book clubs.

34

Drop off Medicare info at barbershops, salons, laundromats

35

Put an “Ask Me About Medicare” car magnet on your car with your phone number.

36

Place fliers at doctors, dentists, chiropractor, physical therapy, and other provider offices.

37

Sponsor a newsletter or email blast from a senior-focused website.

38

Sponsor a local senior-focused event and get your logo/flier in the program.

39

Advertise in church or synagogue bulletins with Medicare-friendly messaging.

40

Use YouTube pre-roll ads targeting turning-65 search terms.

CLIENT RETENTION (AND REFERRALS)

- 41** Write hand-written thank you notes and ask for referrals.
- 42** Send holiday or birthday cards to existing clients.
- 43** Send monthly or quarterly newsletters, digital or printed.
- 44** Offer annual plan reviews for all clients.
- 45** Create a mini welcome kit for new clients with plan info, Medicare hotline numbers, and a magnet.
- 46** Share new plan benefits they may not be using — like OTC cards or gym memberships.
- 47** Use thank-you videos instead of just written cards for referrals.
- 48** Launch a client spotlight series on social media (with permission) to show you care.
- 49** Host a “Bring a Friend” client appreciation event — encourage them to bring someone turning 65.
- 50** Send quarterly check-in texts just asking “How’s your plan working for you so far?”

DIRECT OUTREACH

51 Purchase Medicare preset appointments.

52 Purchase Medicare inbound calls.

53 Send Turning-65, Medicare/Medicaid, or Chronic Conditions direct mail campaigns.

54 Follow up with old leads.

55 Collect and email list and send a monthly "Tip of the Month" email - keep it short and useful.

56 Offer a free downloadable "Medicare Prep Packet" via email.

57 Mail a personalized "Turning 65 soon?" letter with your photo.

58 Create a reactivation email for cold leads: "Still need Medicare help?"

59 Use "handwritten" direct mail services for a personal touch (like Handwrytten or Thanks.io).

60 Buy compliant internet leads.

NICHE TARGETING

61

Focus on veterans and help them navigate Medicare + VA. Collaborate with local VA offices or veterans' support orgs.

62

Target small businesses retiring early employees.

63

Serve non-English speaking communities with multilingual marketing.

64

Focus on rural areas with limited agent access.

65

Help clients relocating from out-of-state or downsizing locally.

66

Focus on clients with chronic conditions (diabetes, COPD, ESRD, etc.) — certain plans are built for them.

67

Focus on retired teachers and school staff — often have unique retiree health plans.

68

Host a “Medicare for [Niche]” webinar

69

List yourself in niche directories (e.g., veteran-owned business directories).

70

Build relationships with HR departments of local unions or large employers with early retirees.

CREATIVE & UNEXPECTED

71 Offer free Medicare plan reviews at tax prep offices.

72 Target small businesses retiring early employees.

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TECH & TOOLS

81

Use a video email tool (like BombBomb or Loom) to send personal intros and follow-ups.

82

Add a Medicare quote widget or plan comparison tool to your site (from your Sunfire or MyHealthPlan).

83

Record a welcome video for new leads.

84

Use Calendly or REACH to let prospects book Zoom appointments on their own.

85

Create templated email and SMS campaigns for AEP and turning-65 clients.

86

Host a recurring live Q&A using Zoom and promote it with a signup form, Facebook, or Nextdoor.

87

Install a live chat widget on your site to engage visitors in real time.

88

Launch a YouTube channel answering common Medicare questions weekly.

89

Create a custom email signature with a call to action: "Know someone turning 65? Send them my way."

90

Write local SEO blog posts (e.g., "How Medicare Works in [Your City]").

RANDOM MARKETING IDEAS

91

Design business cards and give everyone multiple so they can pass them along to their friends.

92

Set up paid ads on Facebook, Google, or Nextdoor.

93

Team up with senior-focused travel agencies – Help their clients understand coverage while traveling, especially internationally.

94

Set up at farmer's markets with a Medicare Q&A table.

95

Write a monthly Medicare tip column for a local newspaper or newsletter.

96

Sponsor a pickleball tournament for 55+ communities – with your name on shirts or banners.

97

Partner with carrier reps to learn about any marketing opportunities that they have available.

98

Host monthly “Medicare & Muffins” events at a local diner or library.

99

Offer Medicare office hours at a senior center, once a week, no appointment needed.

100

Do a Medicare-themed art contest with prizes for local seniors or their grandkids.

BONUS TIPS & TRICKS

LEAVE EXTRA BUSINESS CARDS EVERYWHERE AND WITH EVERYONE.

QR CODES ARE AN EASY WAY TO GET PEOPLE TO SHARE THEIR INFORMATION WITH YOU.

THE FLIERS WITH TEAR-AWAY BOTTOMS ARE GREAT FOR LEAVING AT COMMUNITY BOARDS.

REGULARLY BRING DONUTS OR TREATS TO ANY PLACE OF BUSINESS THAT GIVES YOU REFERRALS.

YOU ARE NOT SELLING MEDICARE. YOU ARE SELLING YOURSELF. BE FRIENDLY.

THE GOAL

THE SALES CYCLE IS OFTEN MUCH LONGER THAN 1 MEETING. THIS MEANS THAT YOUR GOAL IN GETTING OUT IN THE COMMUNITY IS TO NURTURE NEW CONNECTIONS AND BUILD A LIST OF POTENTIAL LEADS AND SALES THAT YOU CAN CONTINUE TO WORK, LONG TERM.

THE MOST SUCCESSFUL AGENTS GENERATE THEIR OWN LEADS AND COLLECT PERMISSION TO CONTACT FORMS YEAR ROUND, SO THEY HAVE LOTS OF OPPORTUNITIES DURING AEP.

DON'T WAIT TILL AEP TO GENERATE LEADS.