

# NETWORKING IN A BOX



## GOLDEN YEARS

SENIOR INSURANCE  
MARKETING

AN INTEGRITY II COMPANY

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# GUIDE TO SOCIAL MEDIA

Use Social Media to help expand your book of business

You'll need to create a business page. Facebook offers a great Step-by-Step Guide on how to do this.

All social media content is subject to CMS Medicare Communications and Marketing Guidelines. Before you start creating posts, it's crucial to understand and follow the guidelines. Failure to comply puts you at risk for penalties, including the risk of losing your license. Contact your upline Compliance Officer and have your content approved before posting.

As you get started, follow the recommendations below to create successful posts.

## DO'S — WHAT MAKES A GOOD SOCIAL MEDIA POST?

- **Clear Messaging** - Make sure your posts use easy-to-understand language to make a simple, useful point.
- **Use Images** - Your posts will do better when they catch people's attention with a photo or an attractive design.
- **Deliver Knowledge** - Share educational information to help your audience understand insurance basics.
- **Call-to-Action (CTA)** - Always include a CTA to encourage followers to inquire, share or visit your website.
- **Brand Yourself** - Find a visual style and stay close to it so that your audience gets to know you and your style.
- **Use Templates** - Start simple with materials from your FMO, then expand into free post templates available online.

## DON'TS — STEER CLEAR OF THESE!

- **Avoid Jargon:** Stay clear of industry terms — speak like you're talking with a friend.
- **Don't Overpromote:** Post helpful information without personal sales pitches.
- **Avoid Tricky Topics:** Stay friendly and professional, and keep posts helpful.
- **Don't Forget CMS:** Make sure to follow CMS communication and marketing rules.

## TIPS FOR LONG-TERM SUCCESS

- **Hashtag Strategy:** Find an online resource and learn how to use a few hashtags to connect with larger audiences.
- **Respond to People:** Reply to comments, mentions and messages with friendliness and professionalism.
- **Post Regularly:** Maintain a regular posting schedule to keep your audience engaged and informed.
- **Post With Purpose:** Be genuine and professional, and allow people to find you as your following grows.
- **Join an Agent Group on Facebook:** Meet with other agents in your community to see what works for them.

By starting with these guidelines, you can create a professional and friendly social media presence that informs current clients and attracts potential clients, while building a positive reputation within your community. You've got this!

# NETWORKING KIT

Build relationships with local providers to grow your business

Use these materials to help you become a successful advocate in your community, helping patients get the Medicare plan that's best for them.

## Included in Your Networking Kit

### Agent Introduction Letter

Introduce yourself as a Medicare resource patients can trust

### Flyer

Leave behind to remind providers how you can help their patients by answering their Medicare questions.

### Provider How-To Guides: Doctor, Pharmacy, Dental Offices

Guides for each kind of provider you may work with: doctor, pharmacy and dental offices. Each one has simple tips to help you serve their needs.

### Provider Types Guide

Get to know some of the differences between three types of provider offices and how to



## How to Use Your Materials

1. Read over all of the materials so you understand the whole process.
2. Choose the providers you will reach out to first, and print copies of your Introduction Letter. Sign the letter as a personal touch.
3. Print out copies of the leave-behind Flyer to bring with you
4. Start making connections.

## Growing Your Network

Be yourself. Making connections in your community is more successful when you meet others through your own passions and interests. Try joining Facebook groups, work with local churches, social clubs, art or exercise groups and more.

Finally, discover ways to let providers know you are a local resource. Social media is just one method to put the word out. Reference our "How-To Social Media Guide" for more tips!





# HOW-TO GUIDE: STARTING THE CONVERSATION WITH DENTAL OFFICES

Tips for building relationships with dental offices.

## Starting the Relationship

Your goal is to become a local, trusted resource for Medicare guidance. Here's a few ideas to start relationships with dental offices.

- **Search** to find the dental offices in your area that **accept Medicaid and Medicare**.
- **Call** each dental office to introduce yourself as a **local agent community resource**.
- **Ask** when you can bring in lunch for the office
- When you visit, **bring a copy** of your **introduction letter and flyer** to leave with them.
- Ask them about any **upcoming events**, and offer to **participate**. Offer to **lamine** their patients Medicare cards.
- **Be real. Be friendly** - when they can tell that you care, they will care about what you offer.

### Be Compliant!

Your interactions with health care providers need to always adhere to the Federal Anti-Kickback Statute (42 U.S.C. 1320a-7b), a criminal law which places strict limitations on payments or gifts connected to health providers or patients who receive federally funded services.





# UNDERSTANDING WHAT DENTAL OFFICES CARE ABOUT

Tips for building relationships with dental offices.

## Starting the Relationship

**Provider offices all work in unique ways, but dental offices will often have common concerns and needs for helping their patients. Get to know some basics so you're ready to help:**

- Patients may delay services or leave completely due to lack of coverage.
- Get to know the available dental plans that patients are using.
- Learn which dental plans in the area have changed coverage recently.
- Know the new covered services in available dental plans.

## Nurture The Relationship

Increase your "stickiness" so that each dental office remembers you with simple gestures:

- If you offer a client newsletter, ask if you can place it in their waiting area.
- Keep building relationships with the office:
- Offer to bring flowers for the front desk.
- Deliver healthy snacks for the office staff (make sure you leave a note with the food, reminding them you have stopped by and how to get in touch).
- Talk to everyone you encounter to build relationships: billing clerk, receptionist, dentists, hygienists and so on.
- Create branded items that the staff or patients can use: pens, notepads, calendars or magnets.

## Be Their Local Resource

Your relationship with dental offices can help both their business and their patients' well-being. You help the dental office serve patients better by answering their patients' dental coverage questions and supporting higher patient satisfaction.



# HOW-TO GUIDE: STARTING THE CONVERSATION WITH PHARMACIES

Tips for building relationships with local pharmacies.

## Starting the Relationship

Your goal is to become a local, trusted resource for Medicare guidance. Here's a few ideas to start relationships with pharmacies.

- Search for “**mom and pop**” pharmacies in your area. These tend to be easier to start a **conversation** with compared to national pharmacies.
- **Call** each pharmacy to introduce yourself, and ask to speak to the owner or manager, introduce yourself **as a local agent** and **community resource**.
- Ask when would be a good time to bring some **snacks for the staff**.
- When you visit, bring a **copy of your introduction letter and flyer** to leave with them.
- Ask them about any **upcoming events**, and offer to **participate**. Offer to **lamine** their patients Medicare cards.
- **Be real. Be friendly** - when they can tell that you care, they will care about what you offer.

### Be Compliant!

Your interactions with health care providers need to always adhere to the Federal Anti-Kickback Statute (42 U.S.C. 1320a-7b), a criminal law which places strict limitations on payments or gifts connected to health providers or patients who receive federally funded services.



# UNDERSTANDING WHAT PHARMACIES CARE ABOUT

Tips for building relationships with pharmacies.

## Starting the Relationship

**Provider offices all work in unique ways, but pharmacies will often have common concerns and needs for helping their patients. Get to know some basics so you're ready to help:**

- Be prepared with helpful information about popular drugs that may not be covered by some of the available plans.
- Get to know recent changes in drug coverage for local carrier plans and how this may affect their patients.
- Offer to help their clients understand cost, medication coverage and deductible.

## Nurture The Relationship

Increase your “stickiness” so that each pharmacy remembers you with simple gestures:

- Offer to stock their bowl of mints or candy. This gives you the chance to keep coming back.
- Deliver healthy snacks for the staff (make sure you leave a note with the food, reminding them you have stopped by and how to get in touch).
- Talk to everyone you encounter to build a friendly and trusting relationship.
- Sponsor their prescription bags — ask your FMO for vendor recommendations.
- Leave behind branded items with your information on them, such as pill holders or drug tracker cards.

## Be Their Local Resource

Your relationship with pharmacies can help their patients' well-being. You're helping with patient peace of mind, answering their broader health care coverage questions, supporting higher patient satisfaction and making sure patients have access to the right Medicare plan for their needs.





# HOW-TO GUIDE: STARTING THE CONVERSATION WITH DOCTORS

Tips for building relationships with local doctor offices..

## Starting the Relationship

Your goal is to become a local, trusted resource for Medicare guidance. Here's a few ideas to start relationships with doctor offices.

- **Search** to find doctor offices near to you.
- **Call** each doctor office to introduce yourself, and ask to speak to the office manager or doctor. Introduce yourself **as a local agent and community resource**.
- Ask when you can **bring in lunch for the office**.
- Stay informed about providers who are **moving or leaving**, and ask them if you could **host a seminar** to help their patients stay in-network
- When you visit, bring a **copy of your introduction letter and flyer** to leave with them.
- Ask them about any **upcoming events**, and offer to **participate**. Offer to **lamine** their patients Medicare cards.
- **Be real. Be friendly** - when they can tell that you care, they will care about what you offer.

## Be Compliant!

Your interactions with health care providers need to always adhere to the Federal Anti-Kickback Statute (42 U.S.C. 1320a-7b), a criminal law which places strict limitations on payments or gifts connected to health providers or patients who receive federally funded services.



# UNDERSTANDING WHAT DOCTOR OFFICES CARE ABOUT

Tips for building relationships with doctor offices.

## Starting the Relationship

**Provider offices all work in unique ways, but doctor offices will often have common concerns and needs for helping their patients. Get to know some basics so you're ready to help:**

- Stay on top of changes to coverage in local plans, as this can affect their patients.
- Be informed about any new carriers in the network or carriers that are leaving.
- Doctors may not have a lot of time with each patient, so having someone who can answer coverage questions can help.

## Nurture The Relationship

Increase your “stickiness” so that each provider office remembers you with simple gestures:

- If you offer a client newsletter, ask if you can place it in their waiting area.
- Enhance their waiting room experience by stocking a candy bowl or bringing flowers.
- Deliver healthy snacks for the office staff (make sure you leave a note with the food, reminding them you have stopped by and how to get in touch).
- Talk to everyone you encounter to build relationships: billing clerk, receptionist, doctors, nurses and so on.
- Find ways to create materials with your contact information, and leave them at the office for patients. It could be simple items that add value, like pens, medication trackers or pill boxes.

## Be Their Local Resource

Your relationship with providers can help their patients' well-being. You're helping with patient peace of mind, answering their broader health care coverage questions, supporting higher patient satisfaction and making sure patients have access to the right Medicare plan for their needs.