Informal Sales Event Guidance

Contents

What is an Informal Sales or Tabletop Event?

An event sponsored and conducted by a plan in a less structured or less formal environment, typically a manned table and chair activities/events, Health/Wellness fairs, kiosk or any other form of "street" marketing (e.g. lemonade stands, etc.)
Activity paid for and conducted by the plan with the purpose of "marketing or attempting to steer potential members towards a specific or limited number of plans"
Any public setting in which we establish a "presence" and No formal group and/or sales presentation is planned, but proactive interactions with beneficiaries requesting information, future follow-up or with specific questions about the plan or to set 1:1 appointments after the event has taken place. **Note:** Scope of appointment must be obtained prior to a 1:1 appointment that results from the event

What is the Purpose of a Tabletop Event?

- **Marketing**
- **Prospecting with intent to sell**

How do I Find a Location to Host a Tabletop Event?

Take the time to define who you want to get in front of and what you're offering. Generally, the more targeted your approach, the better your results will be.

- **Determine audience you want to target**
    - Any senior/LIS/T65/people who don't speak English/People moving
- **Locate businesses/events where target audience congregates**
    - Health fairs, certain businesses, pharmacies
    - Convey value of your table to business/event

How do I Report a Tabletop Event?

CareFree Insurance CareFree Insurance is required to notify plan sponsors about any sales and marketing events where our agents will be presenting that carrier's Medicare plans. For Aetna, the sales leads submit their events to the specific AET health plan/market.

For other carriers, the sales leads should be following the same process and submit events to the carrier. This would include any sales and marketing events held by CareFree agents.

Aetna/Coventry-Specific Events

Report all formal and informal marketing/sales events by the 18th of each month for events scheduled for the following month to Jessica Nunez (**NunezJ@carefreeinsurance.net**) and copy local Manager.

Report all marketing/sales events (including additional events reported throughout the month) prior to advertising the event or 10 calendar days prior to the event's scheduled date, whichever is earlier. Aetna reserves the right to reject last-minute event submissions that do not meet CMS and Aetna requirements.

Humana-Specific Events

Must be completed 21 days prior to the event and emailed to the Humana sales manager that you are working with or the event will not be approved.

WellCare-Specific Events

Reporting must be completed in the time frames below and emailed to the WellCare sales manager that you are working with or the event will not be approved.

Minimum lead/approval time:

- Non-advertised events: 10 days
- Direct Mail: 30 days
- Print: 16 days

How do I Prepare for a Tabletop Event?

- Contact venue 2-3 days prior of your event date verifying that you will be there at the scheduled time and date
- **For Cancellations:**
  - Notify marketing coordinator and/or manager if you are cancelling and/or updating an event LESS than 48 hours before originally scheduled date/time: agent must be present at location at scheduled start time, and remain for 30 minutes to notify attendees of cancellation/change AND distribute plan material; ask venue if sign can be posted for late arrivals that venue will remove later
  - Notify if canceled/updated MORE than 48 hours before originally scheduled date/time: contact the marketing coordinator and/or manager so that attendees get notified by same method used to advertise event

What do I Do to Start a Tabletop Event?

- Dress professionally (business casual)/ name tag/business cards
- Plan to arrive 30 minutes prior to start time to setup and begin the presentation and/or table top event at the scheduled start time
  - Do not park and occupy in prime parking spots of the venue location
- Contact marketing events coordinator and/or manager if running late – letting them know event will not start at reported start time so CMS can be informed ASAP
- Contact venue and request them to post a sign to advise attendees, ex: “Event will start at <new time> due to agent stuck in heavy accident traffic.”
- Check-in to make sure venue knows you are present (manager, receptionist, hostess/cashier, etc.); present letter of authorization; Introduce yourself and describe what you do
- Get Verification Form signed at this time (pertains to CVS events)
- Agent must attend for the entire time scheduled in Sales Force*
- Agent may leave the event ONLY if there is an alternate Host present
- Minimum event time is 1 hour, excluding setup
- Agents may stay past the set end time
- Provide your contact information upon request by the member or beneficiary
- Remain at event until it’s over - do not leave the event site, table, kiosk, etc.
- If you leave kiosk or table you must put a signage with return time (bathroom break, lunch, etc.)
- Do smile, be friendly
- Neatly and properly place table cloth on table
- Place pens, brochures, flyers, business cards, promos, pop-displays and marketing materials on table
- Secure your personal belongings

Setting Up and Breaking Down:
• Upon completion of the event, break down your table and chairs, and notify the Management Team Member that the event is over and that you are leaving • Kindly thank them for having you there
Don’ts
• **Do not conduct health screenings** or other like activities that could give the impression of “cherry picking” • **Do not require beneficiaries to provide any contact information** as a prerequisite for attending the event; unless they provide it • Do not distribute or display sign-in sheets • Do not use personal contact information obtained to notify individuals of raffle or drawing winnings for any other purpose • Do not claim that you are recommended or endorsed by CMS, Medicare, or the Department of Health & Human Services (DHHS) • Do not make any “absolute” or qualified superlative statement(s) about the plan(s) offered without including a reference to the source of information • Do not market any non-health related products h- (such as annuities or life insurance) • Do not make statements that could be construed as “scare tactics” in order to put any pressure on beneficiaries to enroll in a plan or make inaccurate, inappropriate, or misleading statements which is strictly prohibited • Do not ask beneficiaries for referrals. Referrals can be requested from current members, but the information provided can only be name and mailing address. No phone numbers or email address may be provided • Do not play on your phone and not make eye contact with prospective members

What are some Best Practices for a Tabletop Event?

Attracting Beneficiaries

- **Positive Attitude** –Attitude & Expectations influence outcome -approach opportunities w open-mind/positive expectation to increase likelihood of success!
- **Talk to Everyone** –Sales is a numbers game -more people you talk to, more sales you'll score! If you tend to be introverted/soft-spoken, practice ways to break the ice and try partnering up w/ more vocal brokers to learn from their approach. stand in front or on the side of the table
- **Attract Attention** –We're not allowed to "approach", so draw clients to you w visually appealing displays, giveaways & a smile!
- **Be Friendly/Approachable** –People are naturally weary of sales people, so aim to be someone clients WANT to interact with -initiate contact with a warm greeting and normal conversation to make them feel comfortable
- **Establish Trust/Credibility** –Come across professional, knowledgeable and sincere– know the benefits, practice delivery and be prepared with all the needed sales tools (Benefit highlights, SOB, Provider Directory, Drug Formulary)
- **Spark Interest with Catchy Openers** –Identify common needs/issues that will resonate and offer solutions
- **Partner-Up** –Collaborate with brokers who can help you to reach a wider audience & improve effectiveness (males w females, reps of different languages spoken, etc.)

Dialogue:

- Have an "elevator speech" ready
    - If approached by a perspective member or beneficiary and they ask: "Hello, what do you do?" You can start by saying: "I work with eligible Medicare individuals and/or beneficiaries and I help them sift through the complicated issues that make-up Medicare. I can help an individual find benefits that suit their needs." "How may I help you or another individual that may benefit from my help."
- **You must get Consent to Contact to contact beneficiaries AFTER the event**
    - If anyone would like a call back, have them complete the Consent form electronically on your web page. If they ask can you please contact me, you can say: *"I would be happy to however, due to CMS regulations I am unable to do say, unless you feel out a permission to call slip which I have here.*
- **You must get Scope of Appointment to conduct a 1 on 1 sales presentation with them AFTER the event**
    - Provide a two available times for that person; preferably an afternoon or morning appointment.)or set-up the appointment right then and there if permission to contact is granted
- Complete a Scope of Appointment before presenting the plan