

THE HEALTH EXPERTS INSURANCE

COMMUNITY EVENTS PLAYBOOK

Phase 3

Converting

Turn names on a sign-in sheet into actual enrollments — without being pushy.

Bilingual: English + Español

Lead capture template | Same-day follow-up | 7-day sequence | Monthly visit rhythm

Why Phase 3 Matters

You showed up. You collected names. Now what?

Most agents lose 80% of their community event leads in the first 7 days because they don't follow up — or because they follow up wrong (too aggressive, too soon, too sales-y).

This phase is about converting interest into appointments, and appointments into enrollments. Done right, a single community event with 8-10 names should produce 2-3 appointments and 1-2 enrollments. Over a year of monthly visits, that's 24-30 enrollments from one venue alone.

This document gives you:

- A lead capture sheet template (so you don't lose anyone)
- A same-day follow-up text and email
- A 7-day follow-up sequence
- Scripts for handling the most common follow-up objections
- How to turn one visit into a recurring monthly partnership

THE RULE: A name on a sign-in sheet is worth nothing until you call them. The agents who win community events follow up within 4 hours of leaving the venue.

1. Lead Capture Sheet

Bring a printed lead capture sheet to every community event. Do not rely on memory or napkins. Capture the right info, in the right way, so you can follow up effectively.

What to capture for each person

- First and last name
- Phone number (cell preferred)
- Email (optional but valuable)
- Age range or birthday month (don't ask exact birthday at first meeting)
- Current situation: New to Medicare / Already on Medicare Advantage / On Original Medicare / Has Medicaid + Medicare
- Their specific question or concern
- Best time to follow up (morning / afternoon / evening)
- Preferred language (English / Spanish / either)
- How they heard about you (event name)
- Permission to follow up: YES / NO (must have YES to call them)

Sample lead capture sheet

Here's a clean template you can print and bring to every event:

Name: _____

Phone: _____

Email: _____

Age range: ☐ Under 65 ☐ 65-70 ☐ 71-75 ☐ 76+

Current situation:

- ☐ New to Medicare (turning 65 soon)
- ☐ Already on a Medicare Advantage plan
- ☐ On Original Medicare only
- ☐ Has Medicaid + Medicare (dual eligible)
- ☐ Not sure

My question or concern: _____

Best time to follow up: ☐ Morning ☐ Afternoon ☐ Evening

Preferred language: ☐ English ☐ Spanish ☐ Either

How did you hear about us? _____

Date of event: _____

☐ YES, I give permission to be contacted by [Agent Name] to discuss my Medicare options.

Signature: _____ Date: _____

This signed permission line is essential for CMS compliance. Without it, follow-up may be considered unsolicited contact. Always get the signature.

2. Same-Day Follow-Up (Within 4 Hours)

This is the single most leveraged touch in the entire follow-up sequence. Send a brief, warm message within 4 hours of leaving the event — while you're still fresh in their mind.

Why same-day matters

Memory is most vivid in the first 24 hours after meeting someone. A same-day touch:

- Reinforces that you're real, professional, and follow through
- Sets you apart from 90% of agents who never follow up at all
- Builds trust before the cold calls and emails of competitors arrive
- Increases your eventual conversion by 2-3x

Two formats: text or email

Text is more personal and gets opened faster (98% open rates). Email is more professional but slower. Best practice: send BOTH. Text first, then a slightly longer email with your business card attached.

ENGLISH — SAME-DAY TEXT

"Hi [First Name], it's [Agent Name] from The Health Experts — really enjoyed meeting you today at [event]. Just wanted to say thanks for stopping by. When you have a chance, I'll send a quick email with the info we talked about. No rush — just here when you're ready. Have a great evening!"

ENGLISH — SAME-DAY EMAIL

Subject: Great meeting you today, [First Name]!

Hi [First Name],

Just a quick note to say it was wonderful meeting you today at [Event Name]. I really appreciated you stopping by my table and the conversation we had about [specific topic they mentioned].

As promised, here's [whatever you said you'd send — the handout, the resource, your business card, etc.].

Whenever you're ready to take a closer look at your Medicare situation, I'm here. We can do it by phone, video, or in person — whatever works for you. There's no rush, no pressure, and no cost to chat.

Save my number in your phone so you can reach me anytime: [Phone].

Have a wonderful evening!

Warmly,

[Agent Name]

The Health Experts Insurance

[Phone] | [Email] | [Website]

ESPAÑOL — MENSAJE DE TEXTO EL MISMO DÍA

"Hola [First Name], le habla [Agent Name] de The Health Experts — fue un placer conocerle hoy en [event]. Solo quería decirle gracias por pasar por mi mesa. Cuando tenga oportunidad, le enviaré un correo con la información que hablamos. Sin prisa — aquí estoy cuando esté listo(a). ¡Que tenga buena noche!"

ESPAÑOL — CORREO EL MISMO DÍA

Subject: ¡Qué bueno conocerle hoy, [First Name]!

Hola [First Name],

Solo una nota rápida para decir que fue un placer conocerle hoy en [Event Name]. Aprecio mucho que pasara por mi mesa y la conversación que tuvimos sobre [tema específico que mencionaron].

Como prometí, aquí está [lo que dijo que enviaría — el volante, el recurso, su tarjeta, etc.].

Cuando esté listo(a) para revisar su situación de Medicare más a fondo, aquí estoy. Podemos hacerlo por teléfono, video, o en persona — lo que le funcione. No hay prisa, no hay presión, y no cuesta nada conversar.

Guarde mi número en su teléfono para que me pueda contactar cuando sea: [Teléfono].

¡Que tenga una linda noche!

Con cariño,

[Agent Name]

The Health Experts Insurance

[Teléfono] | [Email] | [Sitio web]

3. The 7-Day Follow-Up Sequence

Most enrollments don't happen on the first call. They happen on the third or fourth touch. Here's a complete 7-day sequence — proven, low-pressure, and respectful of their time.

The sequence at a glance

- Day 0 (event day): Same-day text + email (covered in Section 2)
- Day 2: Phone call — friendly check-in
- Day 4: Soft email with educational value
- Day 7: Phone call to schedule appointment
- Day 14: 'Just checking in' text (if no response)
- Day 30: Final touch (then move them to long-term nurture)

DAY 2: PHONE CALL SCRIPT

ENGLISH

"Hi [First Name], this is [Agent Name] from The Health Experts. We met at [Event Name] a couple days ago. Do you have just 2 minutes?"

WAIT for their answer. If yes, continue. If no, ask when's better and call back.

"I just wanted to follow up on the question you mentioned about [specific question they had]. I've been thinking about it, and I have a few thoughts that might help. Would it be useful if I either explained over the phone right now, or scheduled a quick 20-minute conversation when you have more time? Whichever is easier."

Always offer them control. The phrase 'whichever is easier' increases yes rates significantly.

ESPAÑOL

"Hola [First Name], le habla [Agent Name] de The Health Experts. Nos conocimos en [Event Name] hace un par de días. ¿Tiene solo 2 minutos?"

"Solo quería hacer seguimiento sobre la pregunta que mencionó acerca de [pregunta específica]. He estado pensando en ella, y tengo algunas ideas que podrían ayudar. ¿Le sería útil si le explico por teléfono ahora, o coordinamos una conversación rápida de 20 minutos cuando tenga más tiempo? Lo que sea más fácil."

DAY 4: SOFT EMAIL

ENGLISH

Subject: Quick Medicare resource I thought of for you, [First Name]

Hi [First Name],

Just thinking about our conversation at [Event Name] and wanted to share something useful.

[Insert ONE useful thing — a link to a CMS resource, a quick explanation of something they asked about, an FAQ, etc. Keep it short.]

Hopefully that helps clarify things a bit. Like I said, no pressure to do anything with this — just want you to have good information.

If you'd ever like to chat through your specific situation, I'm always available. My calendar is open and there's no cost to a conversation. Just hit reply or text me at [Phone].

Take care,

[Agent Name]

The Health Experts Insurance

ESPAÑOL

Subject: Recurso rápido de Medicare que pensé sería útil para usted, [First Name]

Hola [First Name],

Pensando en nuestra conversación en [Event Name] y quería compartir algo útil.

[Inserte UNA cosa útil — un enlace a un recurso de CMS, una explicación rápida de algo que preguntaron, una pregunta frecuente, etc. Que sea corto.]

Espero que eso aclare las cosas un poco. Como dije, no hay presión de hacer nada con esto — solo quiero que tenga buena información.

Si alguna vez quisiera conversar sobre su situación específica, estoy disponible. Mi calendario está abierto y no cuesta nada conversar. Solo responda o envíe un mensaje al [Teléfono].

Cúidese,

[Agent Name]

The Health Experts Insurance

DAY 7: PHONE CALL TO SCHEDULE

ENGLISH

"Hi [First Name], it's [Agent Name] from The Health Experts. Just following up one more time on the conversation we started at [Event Name]. Do you have a quick minute?"

"I'd love to set up a 30-minute conversation to walk through your Medicare situation in detail. It's free, there's no obligation, and we can do it by phone, video, or in person — whichever you prefer."

"What works better for you — earlier in the week or later? Morning or afternoon?"

Always give them a choice between two options. Closed-ended questions get appointments. Open-ended questions get 'I'll get back to you.'

ESPAÑOL

"Hola [First Name], le habla [Agent Name] de The Health Experts. Siguiendo una vez más sobre la conversación que empezamos en [Event Name]. ¿Tiene un minuto rápido?"

"Me encantaría coordinar una conversación de 30 minutos para revisar su situación de Medicare en detalle. Es gratis, sin obligación, y podemos hacerlo por teléfono, video, o en persona — lo que prefiera."

"¿Qué le funciona mejor — temprano en la semana o más tarde? ¿En la mañana o la tarde?"

DAY 14: 'JUST CHECKING IN' TEXT

ENGLISH

"Hi [First Name] — just wanted to check in one more time. No rush at all on talking through your Medicare options, but I want to make sure you know I'm still here when you're ready. AEP is coming up — happy to schedule a quick call whenever it works for you. Take care!"

ESPAÑOL

"Hola [First Name] — solo quería hacer seguimiento una vez más. Sin prisa para hablar de sus opciones de Medicare, pero quiero asegurarme de que sepa que aquí estoy cuando esté listo(a). AEP se acerca — con gusto coordino una llamada rápida cuando le convenga. ¡Cuídese!"

DAY 30: FINAL TOUCH (THEN LONG-TERM NURTURE)

ENGLISH

Subject: Last note from me — and a small request, [First Name]

Hi [First Name],

This will probably be my last touch unless I hear from you. I want to respect your time and inbox.

If we never end up working together — that's totally fine. I do hope I was at least useful in some small way. And if you ever DO have Medicare questions in the future, please know my door is always open. Save my number, and reach out anytime.

One small ask: even if working together isn't right for you, do you happen to know anyone — a friend, family member, neighbor — who might benefit from a free Medicare conversation? I'd be honored to help anyone you'd refer.

Either way, thank you for the chance to introduce myself.

Warmly,

[Agent Name]

ESPAÑOL

Subject: Última nota de mi parte — y una pequeña petición, [First Name]

Hola [First Name],

Este probablemente sea mi último mensaje a menos que escuche de usted. Quiero respetar su tiempo y su bandeja de entrada.

Si nunca terminamos trabajando juntos — está perfectamente bien. Espero al menos haber sido útil de alguna pequeña forma. Y si alguna vez tiene preguntas sobre Medicare en el futuro, por favor sepa que mi puerta siempre está abierta. Guarde mi número, y contácteme cuando sea.

Una pequeña petición: aunque trabajar juntos no sea lo correcto para usted, ¿conoce a alguien — un amigo, familiar, vecino — que podría beneficiarse de una conversación gratis sobre Medicare? Sería un honor ayudar a cualquier persona que me refiera.

De cualquier manera, gracias por la oportunidad de presentarme.

Con cariño,

[Agent Name]

4. Handling Common Follow-Up Objections

Even with the best follow-up sequence, you'll hear the same objections over and over. Here's how to handle the top five — without being pushy.

ENGLISH

"I'M HAPPY WITH MY CURRENT PLAN"

"That's wonderful to hear — being happy with your plan is exactly what we want. Out of curiosity, when's the last time someone reviewed it for you to make sure it's still the best fit? Plans change every year, and a quick free check-in can confirm you're in the right place. No commitment if everything checks out — just peace of mind."

"I WORK WITH ANOTHER AGENT"

"That's totally fine — and it speaks well of you that you've built a relationship with someone you trust. I'd never want to step on that. The one thing I'd offer: if your agent isn't bilingual, or if you ever want a second opinion, please know I'm here as a resource. No pressure to switch — just be the second pair of eyes if you ever need it."

"MY FAMILY MEMBER HELPS ME WITH MEDICARE"

"That's wonderful — having family support with Medicare decisions is so important. Would it be helpful if I sent you both some basic info that you could review together? That way your family member has a resource to reference, and you both know I'm here if any questions come up that they can't answer."

"I NEED TO THINK ABOUT IT"

"Of course — these decisions deserve thinking time. Can I ask what specifically you're weighing? Sometimes I can help clarify a question you might be sitting on. And if not, no problem — when's a good time to circle back? Next week? In two weeks?"

"I DON'T WANT TO SWITCH PLANS"

"You don't have to. The conversation isn't about switching — it's about confirming you're in the right place. Most of the time, the answer is 'yes, you are' — and you walk away with confidence instead of wondering. Worth a free 30-minute conversation just to be sure?"

ESPAÑOL

"ESTOY CONTENTO(A) CON MI PLAN ACTUAL"

"¡Qué bueno escucharlo — estar contento(a) con su plan es exactamente lo que queremos! Por curiosidad, ¿cuándo fue la última vez que alguien lo revisó para asegurar que sigue siendo el mejor para usted? Los planes cambian cada año, y una revisión rápida y gratis puede confirmar que está en el lugar correcto. Sin compromiso si todo está bien — solo tranquilidad mental."

"TRABAJO CON OTRO(A) AGENTE"

"Está perfectamente bien — y dice mucho de usted que ha construido una relación con alguien en quien confía. Nunca querría meterme. La única cosa que ofrecería: si su agente no habla español, o si alguna vez quiere una segunda opinión, sepa que aquí estoy como recurso. Sin presión para cambiar — solo para ser otro par de ojos si alguna vez lo necesita."

"MI FAMILIAR ME AYUDA CON MEDICARE"

"Qué maravilloso — tener apoyo familiar con las decisiones de Medicare es tan importante. ¿Le sería útil si les envío información básica a los dos para que la revisen juntos? Así su familiar tiene un recurso para referenciar, y ambos saben que aquí estoy si surgen preguntas que ellos no puedan contestar."

"NECESITO PENSARLO"

"Por supuesto — estas decisiones merecen tiempo de pensarlas. ¿Puedo preguntarle qué está considerando específicamente? A veces puedo ayudar a aclarar una pregunta que tal vez esté pensando. Y si no, no hay problema — ¿cuándo es buen momento para volver a comunicarme? ¿La próxima semana? ¿En dos semanas?"

"NO QUIERO CAMBIAR DE PLAN"

"No tiene que cambiar. La conversación no es sobre cambiar — es sobre confirmar que está en el lugar correcto. La mayor parte del tiempo, la respuesta es 'sí, lo está' — y se va con confianza en vez de preguntándose. ¿Vale la pena una conversación gratis de 30 minutos solo para estar seguro(a)?"

5. Turning One Visit Into a Monthly Partnership

The biggest unlock in community events is consistency. The agents who become 'the Medicare person' at a venue are the ones who show up every single month — same time, same place, dependable as the mailman.

After the first visit

Within 48 hours of your first event:

- ☐ Send a thank-you email to your venue contact (separate from your lead follow-up)
- ☐ Mention 1-2 specific positives about the visit ('It was wonderful meeting [staff member]' or 'I loved seeing how warm your community is')
- ☐ Ask: 'Would it be okay if I came back next month? I'd love to make this a regular thing.'
- ☐ Get a date and time on the calendar BEFORE the conversation ends

The thank-you email to your contact

ENGLISH

Subject: Thank you for yesterday, [Contact Name] — and a question

Hi [Contact Name],

Just wanted to say a huge thank-you for yesterday. It was a pleasure being at [Venue Name], and I really enjoyed meeting your residents and your team. [Insert one specific positive observation.]

If it's okay with you, I'd love to make this a monthly thing. Same day of the month, same time, same setup. The agents who do best at supporting communities are the ones who become a familiar face — and I'd love to be that for [Venue Name].

Could we put the next visit on the calendar? I'm flexible — just let me know what day works best for your community's rhythm.

Thanks again, and looking forward to next time.

Warmly,
[Agent Name]

ESPAÑOL

Subject: Gracias por ayer, [Contact Name] — y una pregunta

Hola [Contact Name],

Solo quería decir muchas gracias por ayer. Fue un placer estar en [Venue Name], y disfruté mucho conocer a sus residentes y su equipo. [Inserte una observación positiva específica.]

Si está bien con usted, me encantaría hacer esto cada mes. Mismo día del mes, misma hora, mismo formato. Los agentes que mejor apoyan a las comunidades son los que se convierten en una cara familiar — y me encantaría ser eso para [Venue Name].

¿Podemos poner la próxima visita en el calendario? Soy flexible — solo dígame qué día funciona mejor para el ritmo de su comunidad.

Gracias otra vez, y espero la próxima.

Con cariño,
[Agent Name]

The monthly cadence — what to do every visit

- Arrive 15-30 minutes early to set up calmly
- Greet the contact AND the front desk staff by name
- Bring a small token for the staff each month (donuts, fruit, candy)
- Bring something different to your table each visit (different handout, different giveaway, different topic)
- Greet returning attendees by name when possible — even just 'Good to see you again!'
- Take notes on residents' situations so you can reference them next month
- Stay 30 minutes after — many residents linger to ask questions in private

Building toward bigger opportunities

After 3-4 monthly visits, you'll start to be invited to more:

- Holiday events (sponsor refreshments, raffle, decorations)
- Bigger educational presentations to a larger group
- Birthday celebrations for residents (with permission, you can be the gift sponsor)
- New resident orientations (huge — pre-Medicare conversion opportunity)
- Referrals to other venues from your contact ('You should also reach out to my friend at...')

THE MATH: One venue with monthly visits over a full year = 12 touchpoints. If even 30% of attendees become enrollment conversations, that's a meaningful pipeline from a single relationship. Three venues at this rhythm = 36 touchpoints/year and a sustainable lead engine that gets stronger every month.

What's Next

You've shown up. You've followed up. You're converting. Now it's time to deepen the relationship with the venues that have welcomed you in.

Phase 4: Building the Partnership

How to turn a monthly visit into a true partnership — with sponsorship offers, quarterly check-ins, and event proposals that make YOU the obvious community insurance partner.

TRACK YOUR FOLLOW-UPS: Use your CRM to set automatic reminders for every touchpoint in the 7-day sequence. The agents who win community events don't have better memory — they have better systems.