

THE HEALTH EXPERTS INSURANCE

COMMUNITY EVENTS PLAYBOOK

Phase 4

Building the Partnership

Turn monthly visits into a true community partnership.

Bilingual: English + Español

Quarterly check-ins | Sponsorship offers | Event proposals | Long-term relationship rules

Why Phase 4 Matters

After 3-4 monthly visits, you've earned something most agents never get: real trust at a venue. Now the question is what you do with it.

Most agents stop here. They do their monthly table, collect their leads, and never deepen the relationship. Then a more proactive agent comes along, offers to sponsor the holiday party, and quietly takes over.

Phase 4 is about becoming the obvious community insurance partner — so deeply embedded in the venue that no other agent can displace you.

This document gives you:

- How to do a quarterly check-in with your contact
- Sponsorship offer frameworks (refreshments, raffles, holiday gifts)
- Event proposal template — when YOU want to host an event there
- Annual partnership review template
- Long-term relationship rules (the things that make or break it)

THE GOLDEN RULE: Phase 4 isn't about doing more — it's about being more present and more generous. The agents who become permanent community partners are the ones who give before they ask.

1. Quarterly Check-In with Your Contact

Every 3 months, schedule a 15-minute conversation with your venue contact that's NOT during a regular event. This is the single most underused tool for deepening community partnerships.

Why a quarterly check-in matters

- Shows you care about the venue, not just the leads
- Surfaces upcoming events you might want to be part of
- Catches issues early before they become deal-breakers
- Positions you as a partner, not a vendor
- Opens the door to bigger opportunities (sponsorships, presentations, holiday events)

How to schedule it

Easiest path: ask in person at the end of your monthly visit. 'Could we grab coffee or do a 15-minute call sometime in the next two weeks? Just want to check in beyond the event itself.' Most contacts will say yes immediately.

The check-in agenda (15 minutes)

- Minutes 1-3: Genuine catch-up. How are they? How's the venue? What's new?
- Minutes 4-7: Ask THEM about the venue's upcoming priorities. What's coming up? What do they need?
- Minutes 8-11: Share what you've been seeing in your conversations with their residents — patterns, themes, common questions
- Minutes 12-14: Offer something specific you could do to support them in the next quarter
- Minute 15: Confirm next month's regular visit, thank them, leave

EMAIL REQUEST FOR THE CHECK-IN

ENGLISH

Subject: Quick coffee or call this month, [Contact Name]?

Hi [Contact Name],

It's been [X] months of monthly visits at [Venue Name], and I wanted to check in beyond just our regular events. Could we grab a quick 15-minute coffee or phone call sometime in the next two weeks?

I'd love to hear what's coming up for [Venue Name] in the next quarter, share a few things I've been hearing from your residents, and see if there's anything specific I could do to support the community better.

Just let me know what works for you. I'm flexible — happy to come by, do a phone call, or meet at a coffee shop if that's easier.

Looking forward to it.

Warmly,
[Agent Name]

ESPAÑOL

Subject: ¿Café rápido o llamada este mes, [Contact Name]?

Hola [Contact Name],

Ya llevamos [X] meses de visitas mensuales en [Venue Name], y quería hacer seguimiento más allá de nuestros eventos regulares. ¿Podríamos coordinar un café rápido de 15 minutos o una llamada en las próximas dos semanas?

Me encantaría escuchar qué se viene para [Venue Name] en el próximo trimestre, compartir algunas cosas que he estado escuchando de sus residentes, y ver si hay algo específico que yo pudiera hacer para apoyar mejor a la comunidad.

Solo dígame qué le funciona. Soy flexible — con gusto puedo pasar por allá, hacer una llamada, o encontrarnos en una cafetería si eso es más fácil.

Espero su respuesta.

Con cariño,
[Agent Name]

2. Sponsorship Offer Frameworks

Sponsorship is the fastest way to deepen a community partnership. Done right, it costs you very little but earns you enormous goodwill. Done wrong, it looks transactional and damages the relationship.

The three rules of sponsorship

- Offer to sponsor things the venue **ALREADY** does — not new events you're imposing
- Frame it as supporting the community, not promoting yourself
- Branding should be subtle (a small logo on a flyer is fine; a banner with your face is not)

Tier 1: Easy, low-cost sponsorships (\$25-100)

Best for: Venues you've visited 1-3 times, building goodwill

- Refreshments for an event (coffee, donuts, fruit, water)
- A small raffle prize (\$25 gift card to grocery store, pharmacy, restaurant)
- Birthday card supplies for resident birthdays
- Office supplies for the staff (Post-it notes, pens, notepads)
- A box of holiday cookies for the staff during November/December

Tier 2: Mid-level sponsorships (\$100-300)

Best for: Venues you've visited 4+ times, established relationship

- Larger raffle prizes (gift baskets, restaurant gift cards, grocery store cards)
- Holiday gift bags for residents (small, branded with venue logo + your business card)
- Bingo prizes for monthly bingo nights
- Educational materials (large-print Medicare guides for the venue's library)
- Event supplies (decorations, plates, cups for monthly potlucks)

Tier 3: Premium sponsorships (\$300+)

Best for: Long-term partnerships with venues you've served 6+ months

- Holiday party sponsorship (food, drinks, decorations for a major event)
- Annual residents' appreciation event
- Educational seminar series (you bring in a guest speaker, sponsor lunch)
- Health fair booth sponsorship
- Furniture or equipment for the venue's common areas (with permission)

HOW TO MAKE A SPONSORSHIP OFFER

ENGLISH

"I've been thinking about how I can support [Venue Name] beyond just my monthly visits. I noticed you have [specific event coming up]. Would it be helpful if I [sponsored refreshments / contributed a raffle prize / provided holiday gift bags] for that?"

"I'm not asking for anything in return — no recognition needed, no special signage. I just want to be a good community partner. What would be most useful?"

Notice what's NOT in this script: 'in exchange for...' or 'if I could put my logo on...' Those phrases turn a gift into a transaction. Skip them.

ESPAÑOL

"He estado pensando en cómo puedo apoyar a [Venue Name] más allá de mis visitas mensuales. Noté que tienen [evento específico próximo]. ¿Sería útil si yo [patrocino los refrigerios / contribuyo con un premio para la rifa / proveo bolsas de regalos para las fiestas]?"

"No estoy pidiendo nada a cambio — no necesito reconocimiento, no necesito letreros especiales. Solo quiero ser un buen socio comunitario. ¿Qué sería más útil?"

THE LONG GAME: A \$50 sponsorship every couple months over a year = \$300. The goodwill that produces from being a generous, no-strings community partner is worth 10x that in long-term retention, referrals, and venue loyalty. View sponsorship as the cheapest marketing you'll ever do.

3. When YOU Want to Host an Event

After 6+ months of monthly visits, you'll have earned the right to propose YOUR own event at the venue. This is where you start to drive serious lead generation — but only if you've built the trust to ask.

Event types that work

- 'Medicare 101' educational seminar (45 min talk + Q&A)
- 'Lunch and Learn' (free lunch, casual education, low pressure)
- 'Pre-AEP Prep' workshop (September, helping residents prepare for AEP decisions)
- 'Medicare Myths' interactive session (more engaging than a lecture)
- 'Bring a Friend' Medicare day (residents invite family/neighbors)

Event types that DON'T work

- Anything that sounds like a sales pitch in disguise
- Carrier-specific presentations ('Learn about [Carrier Name]')
- 'Free quote' events
- Events where you ask for personal info as the price of admission

EVENT PROPOSAL EMAIL

ENGLISH

Subject: Quick idea I'd love to run by you, [Contact Name]

Hi [Contact Name],

Now that we've been doing the monthly visits for [X] months, I've gotten a sense of what your residents tend to ask about most — and I had an idea I wanted to run by you.

I'd love to host a [Event Type] at [Venue Name] for your community. Here's what I'm thinking:

- Length: [45 minutes / 60 minutes]
- Format: Educational presentation followed by Q&A
- Topic: [Specific topic, e.g., 'Medicare Myths That Cost Seniors Money']
- Audience: Open to all residents and any family or friends they'd like to bring
- What I provide: All materials, refreshments, and giveaways
- What I'd ask of you: A room and a date that works for your community

This would be a free educational event — no sales, no pitching. Just genuinely useful information.

Could we chat for 10 minutes about whether something like this would be a fit for your community? Happy to come by or do a quick phone call.

Warmly,
[Agent Name]

ESPAÑOL

Subject: Idea rápida que me encantaría compartir con usted, [Contact Name]

Hola [Contact Name],
Ahora que llevamos [X] meses de visitas mensuales, tengo una mejor idea de qué cosas suelen preguntar más sus residentes — y tenía una idea que quería compartir con usted.

Me encantaría hacer un [Tipo de Evento] en [Venue Name] para su comunidad. Esto es lo que pienso:

- Duración: [45 minutos / 60 minutos]
- Formato: Presentación educativa seguida de preguntas y respuestas
- Tema: [Tema específico, por ejemplo, 'Mitos de Medicare Que Le Cuestan Dinero a los Adultos Mayores']
- Audiencia: Abierto a todos los residentes y cualquier familiar o amigo que quieran traer
- Lo que yo proveo: Todos los materiales, refrigerios, y obsequios
- Lo que pediría de usted: Un salón y una fecha que funcione para su comunidad

Esto sería un evento educativo gratis — sin ventas, sin presión. Solo información genuinamente útil.

¿Podemos hablar 10 minutos para ver si algo así sería buena combinación para su comunidad? Con gusto paso por allá o hacemos una llamada rápida.

Con cariño,
[Agent Name]

4. The Annual Partnership Review

Once a year — typically in January or February — schedule a sit-down with your contact to review the partnership. This is where you formalize the relationship and set expectations for the next year.

What to bring to the meeting

- A summary of the past year (number of visits, number of resident interactions, sponsorships provided)
- A simple thank-you note or small gift for your contact
- A proposed schedule for the upcoming year (12 monthly visit dates)
- Two or three event ideas you'd like to explore in the coming year
- An open mind — you're listening more than talking

Sample annual review agenda (30 minutes)

- Minutes 1-3: Genuine thanks for the partnership
- Minutes 4-10: Recap of the past year — what worked, what didn't, what you've observed
- Minutes 11-18: Listen to their feedback — what would they like to see different or better?
- Minutes 19-25: Propose the upcoming year's schedule and 1-2 new ideas
- Minutes 26-29: Confirm next steps and your January visit
- Minute 30: Genuine thanks again, and leave

EMAIL TO SCHEDULE THE ANNUAL REVIEW

ENGLISH

Subject: End of year wrap-up + planning for 2026, [Contact Name]

Hi [Contact Name],

Hard to believe it's already been [X] months of partnership at [Venue Name]! As we wrap up the year, I'd love to sit down with you for 30 minutes to:

- Reflect on how this past year went
- Hear your feedback on what's working and what could be better
- Propose dates for our [next year] monthly visits
- Share a couple of ideas I have for the coming year

Could we put 30 minutes on the calendar in the next two weeks? I'm flexible — you tell me what works.

Thank you for everything this past year — it's been a pleasure being part of [Venue Name]'s community.

Warmly,
[Agent Name]

ESPAÑOL

Subject: Cierre de año + planificación para 2026, [Contact Name]

Hola [Contact Name],

¡Difícil de creer que ya llevamos [X] meses de alianza en [Venue Name]! Mientras cerramos el año, me encantaría sentarme con usted 30 minutos para:

- Reflexionar sobre cómo fue este año pasado
- Escuchar su retroalimentación sobre lo que está funcionando y lo que podría ser mejor
- Proponer fechas para nuestras visitas mensuales de [próximo año]
- Compartir algunas ideas que tengo para el año que viene

¿Podemos poner 30 minutos en el calendario en las próximas dos semanas? Soy flexible — usted me dice qué le funciona.

Gracias por todo este último año — ha sido un placer ser parte de la comunidad de [Venue Name].

Con cariño,
[Agent Name]

5. The Long-Term Relationship Rules

These are the unspoken rules that make community partnerships last for years — or break them in months. Read carefully. Most agents violate at least one of these without realizing it.

Rule 1: Never miss a scheduled visit

If you committed to monthly visits, show up monthly. Period. Missing a visit without 48-hour notice is a relationship killer. If you have to cancel, do it well in advance and reschedule immediately. Repeat cancellations and the venue will quietly stop returning your calls.

Rule 2: Treat the staff like family

The Activities Director gets credit. The Front Desk staff gets the donuts. The maintenance team gets a 'good morning' by name. The kitchen staff gets a smile. The agents who win community partnerships are kind to everyone, not just the decision-makers.

Rule 3: Never bring a competitor's literature

If you're at a venue, you represent THEI. Don't bring marketing materials from other agencies, don't pitch products that aren't part of THEI's lineup, and don't give the impression you might be moonlighting elsewhere. The venue's loyalty to you depends on your loyalty to your team.

Rule 4: Never gossip about residents or staff

Things you hear at the venue stay at the venue. If a resident shares their health situation, that's confidential. If a staff member confides about another staff member, you didn't hear it. The fastest way to lose a partnership is to be perceived as someone who talks.

Rule 5: Never use the venue as a pure lead magnet

If your only conversations with the venue are about the leads you got, you've crossed a line. Talk about the residents. Talk about the events. Talk about the staff. The leads are a byproduct of relationship, not the purpose.

Rule 6: Be generous before you're asked

Don't wait to be asked to bring donuts. Don't wait for the holiday party to offer a sponsorship. Don't wait for a request to send a birthday card to your contact. Generosity offered freely is worth 10x generosity offered after a request.

Rule 7: Honor the chain of command

If your contact says 'we don't do that' — drop it. Don't go around them to a higher-up. Don't pitch the executive director if you've been working with the activities director. Respecting the venue's internal hierarchy keeps the relationship clean.

Rule 8: Remember the names

Bring a small notebook. After each visit, write down the names of the residents you met and one detail about each (granddaughter's wedding, recent surgery, hobby). When you see them next month, reference it. 'How did Maria's wedding go?' That single sentence builds more trust than 100 sales scripts.

Rule 9: Be patient with conversion

Some residents will take 6 months to call you. Some will take a year. Some will take three years. Don't push. Don't hint. Don't drop subtle reminders. Just keep showing up, keep being helpful, and they'll come to you when they're ready. The patient agent always wins.

Rule 10: When you have to leave the partnership, leave well

If you ever stop serving a venue (you move, you change focus, you retire), tell your contact in person, recommend a replacement, hand off your relationships warmly, and stay in touch. The way you leave a partnership is remembered longer than the way you started one.

THE COMPOUND EFFECT: A community partnership built on these 10 rules generates compounding returns for years. One venue with a 5-year partnership can produce 50-100 enrollments, 200+ referrals, and reputation in the community that no marketing budget can buy. This is the most undervalued asset in Medicare sales.

You've Built Something Real

Phase 4 is where most agents will never reach — because Phases 1, 2, and 3 take more discipline than most agents are willing to give.

If you've made it here, you've built something most agents only dream about: a real, sustainable community presence that produces leads, referrals, and reputation year after year.

Now do it again. Add a second venue. Then a third.

Three venues. Monthly visits. Long-term partnerships. That's a Medicare career most agents will never have.

YAHOSKA AND KATY HAVE BEEN HERE: Most of THEI's strongest community partnerships were built using these exact phases over years. The path is real. The work is real. The rewards are real. Trust the process.