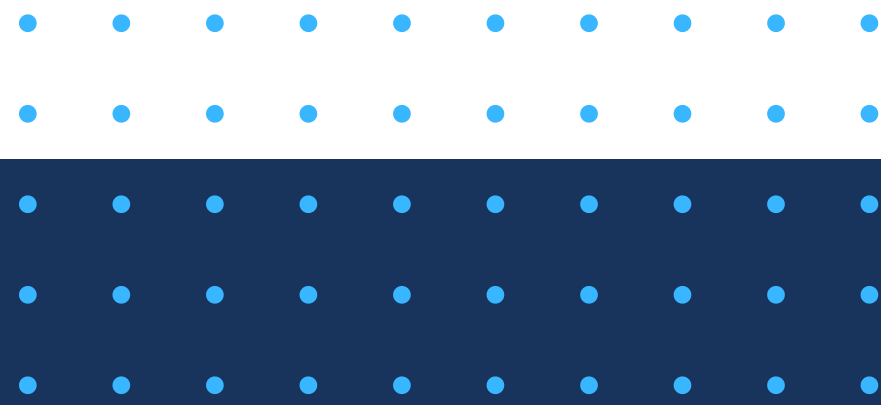




2027 MARKETING PLAN

TIC INSURANCE GROUP
& WEALTH



OVERVIEW

- **PLANNING IS CRITICAL TO OUR SUCCESS AS AGENTS WORKING IN THE MEDICARE SPACE.**
- Failure to do so can result in both a loss of current clients and a lack of access to potential new clients (both T65 and renewal).
- This is not a comprehensive plan as each agent and agency should focus on their specific client-base and the opportunities aligned to your location, budget, and expertise.

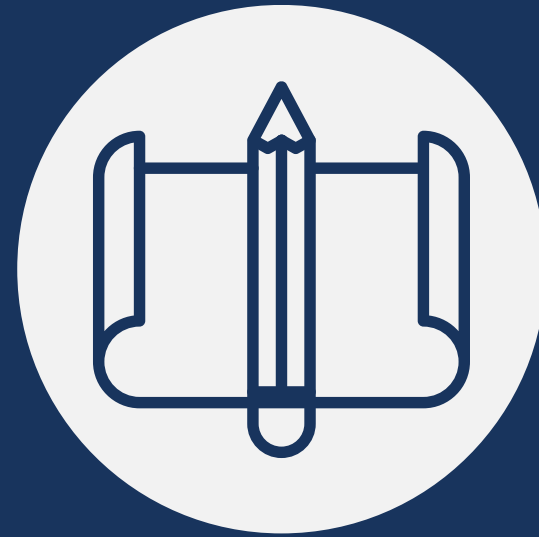


BIG IDEAS



WORK SMART

Always do things that are measurable so you know your return on investment.



PROTECT RELATIONSHIPS

You are building a reputation and every client leads to more clients if you treat them right.



THINK LONG-TERM

Plans, goals, and investments this year will benefit you in years to come. In this industry, residual income is everything.

Marketing Tips

We, Our, Us



EMPOWER + ELEVATE

Prioritize **Compliance**

Use a **multi-faceted approach**

Know the **Carrier-branded advantage**

Utilize templates to **start**

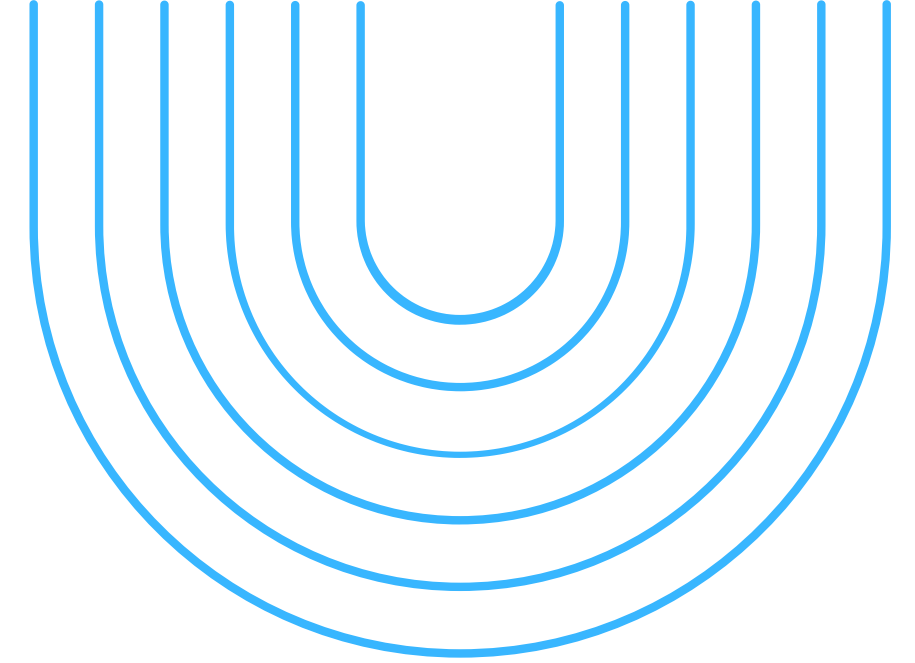
Tell your **story**

Think outside the **box**

Don't age your potential **clients**

Build **cross-marketing connections**

Balance **access/face-time with cost**



01. **PRODUCTION GOALS**
Your Goals, Your Outcomes

02. **BUDGET**
Your Investment, Your Success

03. **MARKETING CHANNELS**
Your Strategies, Your Returns

04. **RETURN ON INVESTMENT**
Your Production, Your Revenue

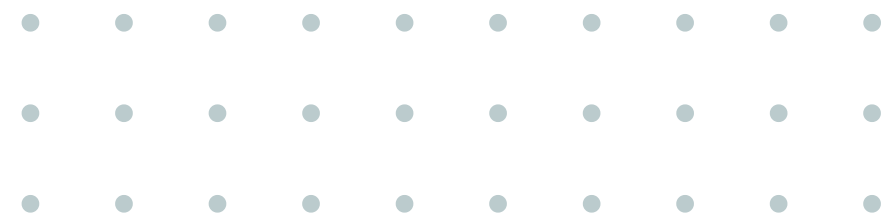
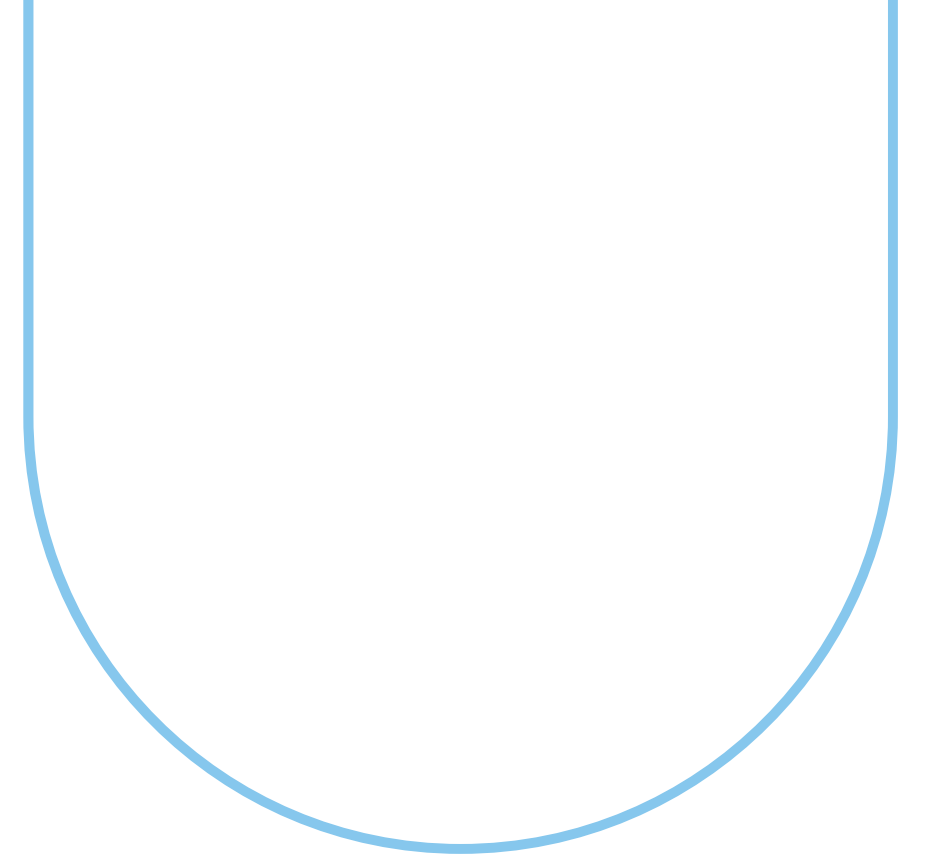
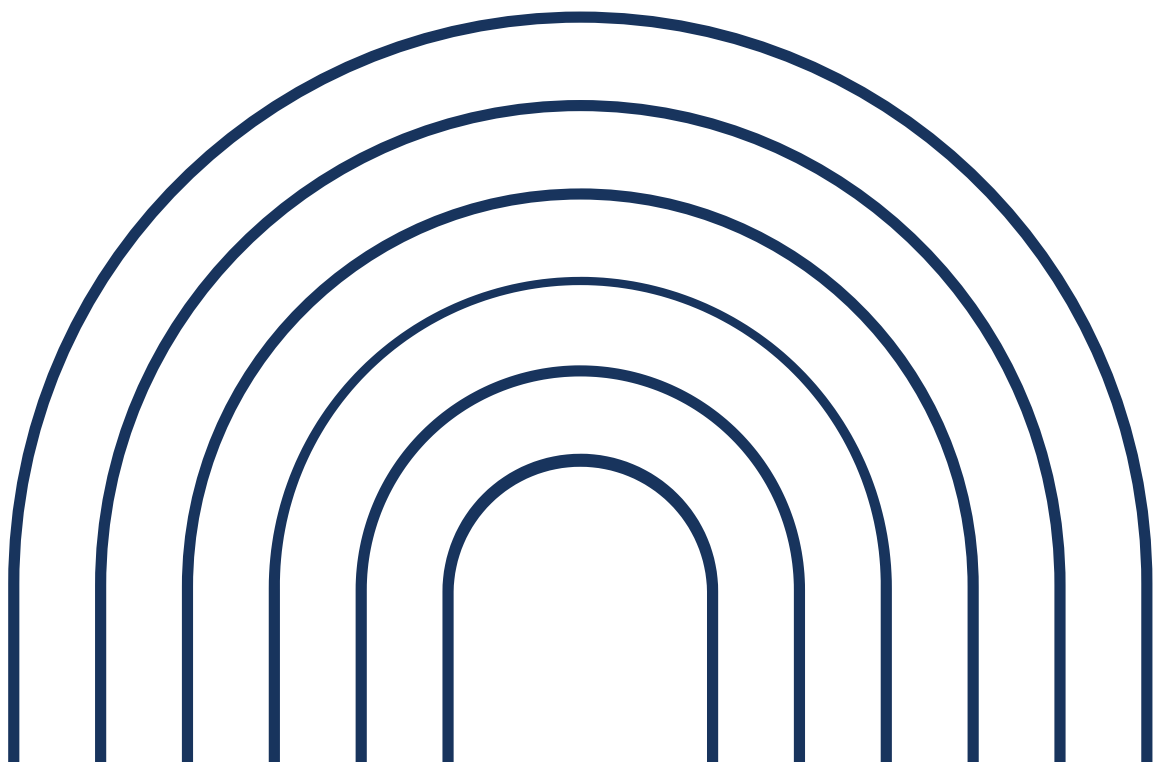


TABLE OF CONTENTS

PLAN INTRODUCTION

- Introduce your plan and your goals
 - What makes you and your team unique and special?
 - **Mission** - What are your big picture goals?
 - **Vision** - How do you plan to achieve these goals from a big picture standpoint?



01.

ANNUAL PRODUCTION GOALS

Goal Setting

Indicator	Target	Actual
T65 Apps submitted:		
New Client Apps (<i>MAPD and Supp</i>):		
Current Client Review Meetings		
Total Apps (<i>MAPD and Supp</i>):		
<i>Targets should be attainable but ambitious.</i>		
Retention rate for current clients:		

02.

BUDGET

MARKETING STRATEGIES

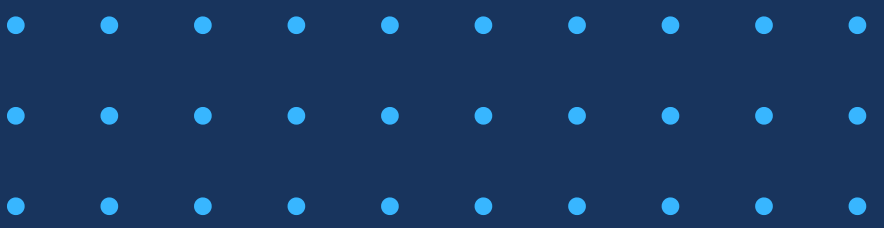
PARTNERSHIPS	LEADS/MAIL	TECH	EVENTS	STANDARD	AVANT GARDE
• Working the books of business of your partners. Have your partners send them letters on their letterhead that you write and pay for • Run events with your partners focused on their expertise and Medicare! • Referrals – ask for them always and often! • Arrange to be in doctor's office lobbys at busy practices during AEP	• Traditional mail leads through TLC available sources • Click Funnel lead providers (Google It!) • Leads from carriers • Hot/warm transfer leads (high risk) • AEP letter to current clients – ask for referrals and invite family and friends • Direct mail marketing from Medicare mailing lists • Post Cards	• Social Media ads • Search engine optimization (Google Ads) • Click Funnels • Ringless Voicemail • Podcasts (you can advertise on appropriate podcasts) • Blogs • Posts • Videos • Influencers	• Leading response dinners • Educational events • Community events, fairs, and shows • Parades • Picnics • Family events • Health fairs • Host grandparent events that include something fun for their grandchildren • Retail Locations: Walmart, CVS, Rite Aid, etc.	• Billboards • Newsprint • E-Newspapers • Community sponsorships • Television • Radio • Promotional items • Direct Mail (coupon books) • Community mailers	• Think outside the box and try to do compelling things that no one else is doing
This is not a comprehensive list. Each agent and agency has to brainstorm ideas. This is the only real way to cut through the very loud noise of Medicare marketing.					

PLANNING TIMELINE

APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER
• Formulate an AEP budget • Establish AEP performance goals and indicators • Order AEP and T65 leads • Formalize marketing and AEP business operation plans • Review CMS Final Rule Requirements and attend subsequent trainings • Establish and/or confirm partnerships for AEP sales and reviews • Conduct educational and sales events • Take conscious steps to build your pipeline • Schedule AEP review meetings	• Finalize a marketing plan and implement your strategies making sure they are measurable • Network, network, network – get out and offer to do no cost reviews for the clients of as many partners as you can • Check in with your current clients. If they haven't heard from you by AEP, they will be more likely to want to meet with you even if they don't need to (ask them for referrals) • If you plan to add seasonal support staff, start to post openings via multiple channels • Schedule AEP review meetings	• Complete a comprehensive review, edits, and a refresh of your website • Begin to communicate about AEP via your standard advertising channels • Post short videos talking about the need for a no-cost review • Client check-ins continued • Networking continued • Interviewing seasonal staff and/or interns • Schedule AEP review meetings • Host as many events as possible	• Complete AHIP • Complete all carrier certifications • Confirm licensure status in each state you intend to sell in • Client check-ins continued • Networking continued • Train seasonal staff and/or interns • Schedule AEP review meetings • Host as many events as possible	• Attend carrier road show and first look events • Send out AEP letters to current clients • Send out benefit check-up forms to all current clients • Client check-ins continued • Networking continued • Train seasonal staff and/or interns • Schedule AEP review meetings • Host as many events as possible	• Client check-ins continued • Networking continued • Interviewing seasonal staff and/or interns • Schedule AEP review meetings • Review compliance with your team • Prepare the office space for AEP meetings with attention to cleanliness, comfort, and accessibility • Host as many events as possible
Marketing strategies should be taking place on a regular schedule throughout the year. Review the building your brand slide deck for some of the many ways you can be doing this. Trying to build your pipeline in September is 12 months too late.					

Annual Budget

Item	Target	Actual
Leads:		
Mailers, Letters, Postcards, Postage:		
Billboards, Radio, TV, Print:		
Social Media, Search Optimization, Tech:		
Events, Dinners, Health Fairs:		
Promotional items:		
General Business Consumables:		
Other miscellaneous:		
TOTAL ANNUAL BUDGET		



**"WITHOUT CONTINUAL GROWTH
AND PROGRESS, SUCH WORDS AS
IMPROVEMENT, ACHIEVEMENT
AND SUCCESS HAVE NO
MEANING."**

- BENJAMIN FRANKLIN.



03.

MARKETING CHANNELS



MARKETING CHANNELS AND COSTS

PRINT

Will run adds In the
Sunday paper
throughout AEP.

\$1100

SOCIAL

Google Ads and
Facebook Spend
Campaign

\$5000

EVENTS

Dinners
Lunches
Picnics

\$5000

Copy to make more pages!

04.

RETURN ON INVESTMENT

ROI Report

Effort	Sales Totals	Expenditure	CPS – Cost Per Sale
		<i>Include all costs from the budget sheet.</i>	<i>Divide Expenditures by Sales</i>
T65 Apps submitted during 2026:			
New Client Apps <i>(MAPD and Supp):</i>			
Total Apps <i>(MAPD and Supp):</i>			