

SEMINAR PREPARATION CHECKLIST

From Planning to Follow-Up: A Repeatable Seminar Process

“The seminar is only the beginning. The real opportunity is what happens afterward.”

Use this checklist as a working guide to plan, market, prepare, conduct, and follow up on educational Medicare seminars. Start the planning process at least eight weeks before the event.

1. Seminar Planning

- ☐ Decide who your target market is (T-65 in the next 8 months)
- ☐ Decide what city you want to hold seminars in.
- ☐ Use ChatGPT, Claude, or your marketing vendor to help determine the best areas of town to focus on. Ultimately, the restaurant may dictate this.
- ☐ Choose dates and times that fit your schedule.
- ☐ Scout restaurant locations in the target area.

Restaurant Fit Checklist

- ☐ Fully private room.
- ☐ Capacity of 30+ is ideal.
- ☐ Waitstaff delivers food - not you.
- ☐ Electrical outlets/plug-ins in an appropriate area.
- ☐ Seating is conducive for learning and everyone can see the TV.
- ☐ Adjustable window coverings so sunlight does not interfere.
- ☐ Menu can be kept near \$15/person for lunch and dinner.
- ☐ Room is guaranteed/reserved and cannot be displaced by another group.
- ☐ Your dates and times are available.

Have the manager sign the reservation agreement. Give them the original and keep a photo. Work with the manager on a special-event menu of no more than five choices under the target meal cost, or discuss a room-fee option

- ☐ Create a printed menu with attendee name at the top and ONE choice to circle. Include your policy for off-menu orders and alcoholic beverages.

2. Seminar Marketing

- ☐ Choose a marketing company. (Step2Success, Taradel, PostcardMania)
- ☐ Get a quote for printing, postage, and mailing 5,000 postcards.
- ☐ Determine whether the vendor designs the card or you do.
- ☐ Confirm whether the card is branded to your business.
- ☐ Determine the RSVP system: will attendees call the vendor or you?
- ☐ Confirm the vendor can provide a list of 5,000 people turning 65 in the next 8 months in the seminar area.
- ☐ Determine whether you own the mailing list.
- ☐ Ask to be placed on the mailing list so you can verify appearance and timing.
- ☐ Confirm cards will arrive in mailboxes 2-3 weeks before the event.
- ☐ Determine the order deadline required to meet that delivery window.
- ☐ Place the order with mailing area, restaurant name, full address, dates, times, and RSVP method.
- ☐ Pay the invoice.

3. Prepare for Next Month's Seminars

- ☐ Update Calendar & Schedule Spreadsheet.
- ☐ Email partners next month's schedule.
- ☐ Prepare seminar slideshow.
- ☐ Set up pre-seminar reminder workflows in Agent CRM for each event.
- ☐ Add appropriate tags, including sponsor/partner and Medicare Lead.
- ☐ Add contact to the Medicare Seminar Opportunity pipeline.
- ☐ Send contact card with an “We're excited to see you” message.
- ☐ Email reservation confirmation with all event details.
- ☐ Set EVENT START DATE to the seminar date and time.
- ☐ Create day-before call task and reminder email.
- ☐ Schedule a two-hour-before-event reminder text.

“A smooth seminar starts long before the first guest walks through the door.”

4. The Week Before the Event

- ☐ Call restaurant and confirm date and time.
- ☐ Print registrations as they come in and place them in a binder.
- ☐ Print Medicare 101 packets.
- ☐ Print Medicare Snapshot and Cross Sale/Share sheets.
- ☐ Print enough event menus for all attendees.
- ☐ Print event labels for the top of the Snapshot forms.
- ☐ Print name tags.

Supply Check

- ☐ TV & stand
- ☐ Extension cord
- ☐ Laptop
- ☐ HDMI cord & adapter
- ☐ Presentation clicker
- ☐ Voice amplifier with Bluetooth microphone
- ☐ Signage
- ☐ Business cards
- ☐ Black Sharpie
- ☐ Blank name tags
- ☐ Wide tape for floor cords
- ☐ Pens - at least one per attendee
- ☐ Magnets with safety code and contact information
- ☐ Vendor giveaways

48 Hours / Day Before

- ☐ Export RSVP list.
- ☐ Email RSVP list to partner(s).
- ☐ Import attendees into Agent CRM.
- ☐ Tag the agent leading the seminar.
- ☐ Add Medicare Lead tag.
- ☐ Add event-specific location/month/lunch-or-dinner tag to trigger reminders.
- ☐ Call the day before to confirm attendance and remind guests.

5. Day of Event

- Do not overbook your day. Keep your energy and attention focused on the seminar.
- Eat before the seminar.
- Arrive 1-2 hours early.
- Review expectations with the manager and waitstaff.
- Have drinks served as attendees arrive.
- Have attendees complete printed meal orders before the presentation.
- Turn orders in before the presentation begins.
- Set expectation for no service interruptions during the presentation.
- Plan for the meal to be served after the presentation.
- Know the waitstaff by name and take care of them.
- Arrange tables so everyone can see the screen.
- Place pens/materials on tables.
- Set up laptop, TV, clicker, microphone, and test everything.

6. During the Event

Check-In

- ☐ Assistant checks guests in before seating.
- ☐ Confirm contact information.
- ☐ Collect missing information - especially birthday.
- ☐ Give each attendee a name tag.
- ☐ Explain the meal-order process and that the special menu must be used.
- ☐ Provide packet and menu.
- ☐ Seat guests in the predetermined presentation area.
- ☐ Block off distracting areas or seats with poor TV visibility.
- ☐ Collect completed menus and give them to waitstaff.

Presentation

- ☐ Greet attendees and build rapport before beginning.
- ☐ Turn on voice amplifier and microphone.
- ☐ Bring energy, confidence, and focus to the presentation.
- ☐ Set expectations: general questions after the presentation; individual questions require a separate Medicare Review appointment.
- ☐ Explain that specific plans/products are not discussed during the educational seminar.
- ☐ Give the presentation.
- ☐ Use name tags and include the audience.
- ☐ Make eye contact; do not read a script.
- ☐ Stay on track and avoid rabbit trails.
- ☐ Keep the presentation clear - if you confuse, you lose.
- ☐ Walk attendees through the Medicare Snapshot and Cross Sale/Share sheet step by step.

The original checklist also cautions against leading with “zero premium” as the value proposition, because doing so can narrow the conversation before the attendee's actual needs and coverage gaps are understood.

After the Presentation / Meal

- ☐ Have the meal served.
- ☐ Walk around and visit with attendees.
- ☐ Make notes on Snapshot forms about questions, IRMAA concerns, retirement help, or other information shared.
- ☐ Ask whether they would like to schedule a Medicare Review Call.
- ☐ Collect the Medicare Snapshot/Cross Share form from EACH attendee before they leave.

“Be present like your business depends on it - because it does.”

7. Immediately Following the Event

Within an hour of the seminar conclusion, move each opportunity to the appropriate pipeline stage and trigger the corresponding follow-up.

SHOWED	NO SHOW	CANCELLED
Tag Showed Seminar Send immediate thank-you text with calendar link Next-day thank-you email Call to say thank you	Tag No Show Seminar Send “we missed you” text with calendar link Call Continue invitation/appointment follow-up	Tag Cancelled Seminar Send cancellation confirmation / “we will miss you” email Call after seminar Continue invitation/appointment follow-up

8. After the Event: Organize & Prioritize

- Use Medicare Snapshot forms to update CRM contact information.
- Review each form and assign the appropriate priority/status.
- Tag each guest by birthday, work status, disability status, and other relevant categories.
- Add the month they enter the Urgent window.
- Physically or digitally organize forms with the most urgent opportunities first.
- Mail a thank-you postcard.
- Call each guest within a few days to thank them and schedule a Review.
- Scan/upload Snapshot forms and share required seminar summary information with partners.

Priority Categories

URGENT	Already in the 7-month enrollment window.
PLANNING	Within 4 months of entering the enrollment window.
CURIOUS	5-10 months from entering the enrollment window.
NURTURE	11+ months from entering the enrollment window.
DISABLED	Already on Medicare due to disability.
65+ ON MEDICARE	Already on Medicare.
STILL WORKING	Working; ongoing monthly nurture.
BABY	More than 2 years away from age 65.

9. Medicare Review Call

Recommended format: 30-minute phone call.

- ☐ Schedule the Medicare Review Call as soon as practical.
- ☐ Send HealthSherpa intake form and Scope of Appointment; confirm completion before the call.
- ☐ Use the call as a discovery conversation.
- ☐ Determine whether they are still working and what they do/did for a living.
- ☐ Learn household/marital context relevant to planning.
- ☐ Confirm whether they have their Medicare card.
- ☐ Learn their retirement fears and Medicare questions.
- ☐ Discuss an action plan and timeline based on their circumstances.
- ☐ Set the next appointment for enrollment or continued fact-finding.
- ☐ Make thorough CRM notes.

10. Medicare Enrollment Appointment

- ☐ Confirm current intake with doctors and medications and a completed Scope of Appointment before the appointment.
- ☐ Review the Medicare coverage option appropriate to the client's needs and build a Medicare Protection Package:
 - MAPD/MA
 - Medicare Supplement + Part D
 - Dental/Vision/Hearing
 - Hospital Indemnity
 - Cancer, Heart Attack & Stroke
 - 24-Hour Accident coverage
- ☐ Explain options clearly and help the client make an informed decision.
- ☐ If a client declines an offered protection product, use an e-sign acknowledgment documenting the decline.

“Need first. Solution second.”

11. Closed Sale & Long-Term Client Care

- ☐ Add all Medicare Protection Plan information into Agent CRM.
- ☐ Move the opportunity to Sold in the pipeline and trigger the Sold workflow.
- ☐ Move/save the client file in the appropriate Medicare Intake folder.
- ☐ Submit required business information to the IMO/team systems.
- ☐ Update Medicare spreadsheet/tracking.
- ☐ Immediately email plan details, premiums, effective date, and other key information.
- ☐ Send a follow-up email about specific plan details about a week later.
- ☐ Send a Google review request.
- ☐ Mail a thank-you card.
- ☐ Text in about two weeks to confirm cards arrived.
- ☐ Keep the client in a monthly communication drip.
- ☐ Call quarterly to check on the client.
- ☐ Invite the client to the annual customer appreciation event.
- ☐ Schedule the appropriate annual/AEP review.

The Bigger Picture

A successful seminar is more than choosing a restaurant, mailing invitations, and giving a strong presentation. The real results come from what happens before AND after the event.

- ☐ Save time by using a repeatable process.
- ☐ Never lose track of a lead.
- ☐ Build consistent follow-up.
- ☐ Know who deserves personal attention first.
- ☐ Get more value from every seminar.
- ☐ Use the process again and again - event after event and market after market.

“The goal isn't just more leads. It's getting more value from every lead you already have.”

Seminar → Lead → Follow-Up → Appointment → Client → Nurture → Referral

Ready to Put It Into Action?

The checklist gives you the process. The full Priority Pipeline Pro program goes further with the implementation resources, tools, templates, workflows, automation, and systems designed to help you put that process to work consistently.

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