



AGENT GROWTH SERIES • GRASSROOTS

My Grassroots Marketing Plan

A personal strategy workbook

Built from The Grassroots Medicare Playbook

Agent name	
Territory / town	
Date started	

How to use this workbook. Work through it section by section with the playbook open beside you. Don't try to fill in everything in one sitting — the goal is a concrete, written plan you can act on Monday. Be specific. "Visit doctors" is a wish; "Dr. Patel's office on Main St, Tuesdays" is a plan.



SECTION 1 — IDENTIFYING YOUR LOCAL PILLARS

The playbook's four pillars are the same everywhere — but your version of them is specific to your territory. This section turns the four pillars into real names, places, and contacts in your territory.

► **Playbook reference:** Section 2 (The Four Pillars), plus Sections 3–6 for what belongs in each.

Pillar 1 — Educational Seminar Venues

Where could you host a free, educational Medicare talk? Think libraries, senior centers, low-income senior housing, 55+ clubhouses, senior-focused church groups, Veteran group meetings.

Venue name & location	Contact person / how to book	Status

Pillar 2 — Provider & Pharmacy Targets

Your highest-leverage pillar. List 15–20 offices, pharmacies, & specialty centers (i.e. dialysis) you can visit on a route. Priority = how valuable / reachable they are (H/M/L).

Office / pharmacy name	Type (PCP, specialist, pharmacy, ancillary)	Front-desk / manager contact	Priority



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Pillar 3 — Community Events & Health Fairs

Where do beneficiaries gather in numbers? Senior health fairs, 65+ expos, community days, farmers markets, pharmacy/grocery wellness days, clinic open houses.

Event name	Typical date / season	Location & host	Cost / table fee



Event name	Typical date / season	Location & host	Cost / table fee

Pillar 4 — Network Anchors

Standing relationships that give repeat, invited access — senior centers, low-income senior housing (watch for dual-eligible opportunity), churches & faith groups, LTC facilities, independent living, clubs (Rotary, VFW, alumni, hobby).

Anchor name	Type	Decision-maker (activity director / pastor / manager)	First step to connect



SECTION 2 — EVENT BRAINSTORMING

Now turn venues and anchors into actual events. Plan the seminars and Q&A sessions you'll run, how you'll fill the room, and how you'll capture and follow up with everyone who shows.

► **Playbook reference:** Section 3 (Educational Seminars) and Section 6 (Network Anchors).

Seminar & talk topics I'll run

Check the topics that fit your market, then add your own.

- ☐ “Medicare 101” / “Welcome to Medicare” — for people turning 65
- ☐ “The 5 Biggest Medicare Mistakes” and how to avoid penalties
- ☐ “Understanding Your Annual Notice of Change” — ahead of AEP
- ☐ “Medicare & Your Prescriptions” — navigating Part D and the formulary

My own topic ideas:

My first three events to schedule

Get specific: what, where, and roughly when.

Event / topic	Venue or anchor	Target month	Lead time to promote

How I'll promote (fill the room)

Promote where seniors actually look. Check what you'll use and note specifics (which library, which Facebook group, which bulletin).

- ☐ Library bulletin boards
- ☐ Senior center newsletters
- ☐ Church bulletins
- ☐ Local Facebook groups
- ☐ Flyers at partner pharmacies

Specifics (name the exact places / channels):



My capture & follow-up plan

The room is warm for 48 hours. Decide your system before the event, not after.

How I'll capture contacts (sign-in sheet at table, laid out at each seat, or passed out after):

Where I'll log them (CRM) and when (same day):

My 48-hour follow-up routine:



SECTION 3 — MY CALENDAR-BLOCKING SYSTEM

This is where a plan becomes a routine. Activity that isn't on your calendar doesn't happen — so block these first and build everything else around them. Commit to specific days and times, not vague intentions.

► **Playbook reference:** Section 8 (The Calendar-Blocking System) and Section 9 (Your First 90 Days).

My weekly rhythm

Fill in the exact day(s) and time you commit to each block. The cadence column shows the playbook's suggested starting point — scale it to your market.

Block	Suggested cadence	My committed day & time	My weekly target
Provider Visit Day	1 day/week · 6–10 visits		
BOB Calls	2–3 hrs/week		
Community / Networking	1 block/week		
Appointments	Open protected blocks		
CRM & Follow-up	30 min daily		

My monthly rhythm

Check these off each month. Write your own target numbers where it helps.

- ☐ Run at least one educational seminar (booked & promoted 2–3 weeks ahead)
- ☐ Touch every active anchor (senior center, housing, or faith group)
- ☐ Review my activity numbers — visits, calls, appointments, referrals
- ☐ Refill the funnel — line up next month's events and confirm venues

My monthly targets (visits / calls / appointments / referrals):

My quarterly focus

Note one or two concrete goals per quarter so the year compounds toward AEP.

Quarter	Theme	My goals this quarter
Q1 (Jan–Mar)	Foundation & Routine	
Q2 (Apr–Jun)	Community Presence	
Q3 (Jul–Sep)	Harvest & Ramp	



Quarter	Theme	My goals this quarter
Q4 (Oct–Dec)	Execution	

My First 90 Days

Your starting cadence. Check each item as you complete it.

Month 1 — Set the foundation

- ☐ Block my weekly calendar (provider day, BOB hours, community block) as recurring
- ☐ Build my target list (15–20 offices/pharmacies, 3–5 anchors) — see Section 1
- ☐ Get my CRM clean and quoting tools ready

Month 2 — Start showing up

- ☐ Begin weekly provider visits — introductions first, value every time
- ☐ Book and promote my first educational seminar
- ☐ Make my first anchor connection (pitch monthly Q&A office hours)

Month 3 — Build the rhythm

- ☐ Run my first seminar and follow up with every attendee within 48 hours
- ☐ Keep provider visits and BOB calls consistent
- ☐ Review my numbers and schedule next month before it arrives

“Plant early, plant often, show up consistently.”