

AGENT GROWTH SERIES • MEETING 2

Branding & Marketing Launch Checklist

Complete what you can before our next meeting. You don't have to finish everything — get the foundation in place and flag anything you'd like help with. This mirrors the strategy deck section by section.

1 • BRAND FOUNDATIONS

- ☐ Professional headshot taken (you'll use it everywhere)
- ☐ Simple logo/wordmark and a consistent 2–3 color set chosen
- ☐ Branded email signature set up — with the TPMO disclaimer above your sign-off

2 • YOUR WEBSITE

- ☐ **Website live** (AgentMethods, Wix, Squarespace, or GoDaddy)
- ☐ Includes headshot, short bio, carriers represented, and service area
- ☐ Contact info plus a calendar / booking link
- ☐ TPMO disclaimer displayed on the site
- ☐ Phone-number disclaimer placed next to any phone number

3 • FACEBOOK & LINKEDIN

- ☐ **Facebook business page created** (kept separate from my personal profile)
- ☐ Profile photo, cover image, and a complete “About” with a contact button
- ☐ TPMO disclaimer in the page info or a pinned post
- ☐ LinkedIn headline positions me as a Medicare advisor for my area
- ☐ LinkedIn “About” written; same professional headshot added
- ☐ Connected with local referral sources (providers, office managers, community contacts)

4 • BUSINESS CARDS

- ☐ **Cards ordered through Agent Store** (or Vistaprint, Moo, etc. — matched to my website colors)
- ☐ Include name, “Licensed Insurance Agent,” phone, email, and website
- ☐ QR code linking to my website / booking page
- ☐ **No plan names, carrier logos, or benefit claims** on the card

5 • MARKETING — LOCAL (GRASSROOTS)

See the Grassroots Medicare Playbook for the full field guide, scripts, and calendar system.

- ☐ Reviewed the Grassroots Medicare Playbook
- ☐ Weekly calendar blocked: provider-visit day, book-of-business calls, community block
- ☐ Target list started: 15–20 provider offices/pharmacies and 3–5 community anchors

6 • MARKETING — POSTAL (TARGET LEADS)

- ☐ **Target Leads access set up** (through the Advocate)
- ☐ **First list selected** — curated T65, book-of-business, or geographic/ZIP

- ☐ First mailer scheduled with a drop date and quantity
- ☐ Mailer carries the TPMO disclaimer and the phone-number disclaimer
- ☐ Plan in place to call responders within 24–48 hours

7 • MARKETING — SOCIAL

- ☐ Facebook and LinkedIn profiles complete and consistent
- ☐ Drafted my first 2–3 posts across buckets (educational, seasonal, community)
- ☐ **Chosen a sustainable cadence** — aim for 1–2 posts per week
- ☐ **No plan-specific content** (plan names, benefits, premiums, carrier logos) unless approved as marketing

8 • COMPLIANCE (CMS) — CURRENT FOR PLAN YEAR 2026

- ☐ TPMO disclaimer on website, email, and any marketing materials
- ☐ Phone-number disclaimer wherever a phone number appears
- ☐ **Call-recording tool ready** — record enrollment-chain calls in full and retain per policy
- ☐ **Plan-specific / marketing materials routed for approval** (carrier/upline first, then HPMS where required)
- ☐ I understand the difference between a “communication” and “marketing”

9 • BRING TO OUR NEXT MEETING

- ☐ Questions, or anything you'd like a second set of eyes on

Note what's done, in progress, or stuck:

This checklist is a practical guide, not compliance advice. When in doubt, run any plan-specific material through your carrier or upline — and through HPMS where required — before you use it.