

Broker Marketing Event Guidelines

What this guide covers

1 Introduction

2 Registering an event

3 Preparing for the event

4 During the event

5 After the event

6 Non-cancellation policy

7 Contact us

8 Appendix



You're a Part of the Devoted Health family!

Our mission is to dramatically improve people's health by caring for them like family so we expect our agents to treat prospects and members with the love and respect they deserve!

When agents participate in a Devoted Health educational or sales event, they are representing Devoted Health. Therefore, it's imperative that agents follow CMS Medicare Communications Marketing Guideline (MCMG) and Devoted Health guidelines to ensure that we're always compliant.

These events require a lot of time and effort to plan and execute so remember to be respectful and considerate to all parties involved—venue staff, beneficiaries, and other agents!



Registering an Event

All event requests must be submitted to Devoted Health at least 14 days in advance (so if event is 6/15, submit by 6/1), using this [form](#).

- We will respond to your request via email within 2-3 business days.
Note: You cannot conduct the event without an approval notice.
- All agents providing information at the event must be certified and ready to sell with Devoted Health.
- If you have an emergency and cannot make it to the event, you must provide 72-hour notice to Devoted Health Community Outreach Specialist. Failure to do so will result in being subjected to disciplinary action.

Preparing for the Event

Make sure you have all the materials you plan to use prior to the event.

- All advertisement and promotional material(s) must be approved by Devoted Health and CMS.
- Pre-approved marketing material(s) can be ordered [here](#).
- Suggested Devoted Health items for events:
 - Banner or A-frame with Devoted Health inserts
 - Business Reply Cards (BRC)
 - Provider Directory book
 - Benefit Plan Booklets
 - OTC Catalog
 - Formulary Booklet
 - Benefits at a Glance
 - Approved agent marketing items (e.g., business cards, flyers, trifolds, teaser cards)
 - Branded tablecloth

Preparing for the Event (con't)

- Confirm that the event is easily accessible for all visitors.
- Make sure there are signs directing individuals to the event location.
- Arrive **at least** 15 minutes before the event start time to set up and stay until the scheduled end time of the event.
- Dress in business casual attire.
- Upon arrival at the event, check in with the contact person and/or staff of the venue and introduce yourself.
- Have your ID at all times.
- Set up your laptop and test the projector and speakers before the event starts.
- Make sure to test the Devoted Health sales presentation video too.
- Set up beverages, and snacks, if applicable.

During the Event

You must market and enroll ONLY Devoted Health products.

- You may NOT promote any other plans at the event or display any non-Devoted Health materials in the immediate selling area (i.e., on the same table).
- If you have to leave the event prior to the scheduled end time, you must notify Devoted Health and your upline agency.

***Note:** All Devoted Health events are subject to secret shopping by Devoted Health and/or CMS. You will not be notified when secret shopping occurs. In the event you violate any Devoted Health and/or CMS policies, you will be subjected to disciplinary actions.*

After the Event

Submit post-event results. Your Community Outreach Specialist will send you a link to the form.

Non-cancellation Policy

In the case of an emergency, you're responsible for finding coverage for the date/time of the event. "No show" is not acceptable.

- Events can only be weather permitted if you make a note of it when you scheduling.
- In the case of extreme weather, contact your Community Outreach Specialist to seek approval for an emergency cancellation.
- Any changes to date/time, location, or other important issues should be reported immediately to Devoted Health Community Outreach Specialists.



Contact Us

For any event-related questions

events@devoted.com or call your market-specific Community Outreach Specialist

Register an event: [Event Form](#)

Order marketing material: [click here](#)

For more Devoted Health or CMS information

Devoted Health: www.devoted.com

Medicare Marketing Guidelines: [2019 guidance](#)

For general questions or immediate assistance

agent-support-team@devoted.com or call **1-877-764-9446**, Mon-Fri 9AM-6PM EST

Appendix

Definition of “Event Types”

- **Informal:** Conducted with a less structured presentation or in a less formal environment. They typically utilize a table or kiosk that is manned by a Devoted Health plan sponsor who can discuss the merits of the plan's products. Examples include working a kiosk at a retail store or a workspace at a provider's office.
- **Formal:** Typically structured in an audience/ presenter style with a salesperson or plan representative formally providing specific plan information via a presentation on the products being offered. In this setting, the presenting sales agent usually presents to an audience that was invited to attend. At some time during a typical marketing event, information may be handed out including enrollment applications.
- **Educational:** Designed to inform Medicare beneficiaries about Medicare Advantage, Prescription Drug or other Medicare programs. **No marketing can occur at any educational event.** Event may be hosted in a public venue by a plan sponsor or an outside entity, but may not be held in one-on-one or in-home setting.

Appendix

Marketing Sales Events Do's and Don'ts

- Marketing/Sales Events are designed to steer (or attempt to steer) enrollees toward a plan. The rules in the table below apply to all marketing/sales events.

Do	Do NOT
Use sign-in sheets as long as they are clearly labeled as optional.	Use any sales scripts or presentations without them being approved by Devoted Health and CMS.
Conduct raffles or drawings in which individuals include their contact information, as long as the information is only used for that purpose, and prizes are of nominal value.	Conduct health screenings or other activities that may be perceived as, or used for, “cherry picking.”
	Require attendees to provide contact information as a prerequisite for attending an event.

Appendix

Educational Events Dos and Don'ts

- Educational events are designed to inform beneficiaries about Medicare Advantage, Prescription Drug, or other Medicare programs. The rules in the table below apply to all educational events.

Do	Do NOT
Host educational event in a public venue and must explicitly advertise the event as educational	Distribute or use marketing, sales, or enrollment forms at the event.
Include communication activities and distribution of communication materials.	
Answer beneficiary initiated questions.	
Set up a future marketing appointment, and distribute business cards and contact information for beneficiaries to initiate contact (this includes completing and collecting a Scope of Appointment (SOA) form).	
Conduct a marketing/sales event immediately following an educational event in the same general location (e.g., same hotel).	



info@devoted.com

1-800-DEVOTED

221 Crescent Street, Suite 202, Waltham, MA 02453