

Sales Event - Do's and Don'ts

Do's	Don'ts
Let beneficiaries approach you first at informal events	Request or accept a referral
Use sign-in sheets that clearly indicate providing contact information is optional	Offer health screenings or similar activities that could seem like, or be used for, “cherry picking”
Name all products and plan types you'll cover before starting	Require attendees to use a sign-in sheet
Use only carrier- and CMS-approved presentations and talking points	Compare one carrier's plan to other carriers' plans by name without getting written consent from all carriers involved in the comparison or without having studies or statistical data to back up comparisons (Comparisons must be factually based and can't be misleading)
Distribute giveaways with your contact information on it ¹	Discuss or cross-sell non-health care related products (e.g., annuities, life insurance)
Give away promotional items that include plan name, logo, toll-free number, and/or carrier website ²	Use absolute or qualified superlatives (e.g., This is the “best” plan!)
Provide refreshments or light snacks (e.g., coffee, soda, fruit, crackers) ³	Use contact information provided by attendees for raffles or drawings for any other purpose
Hand out objective educational materials on Medicare Advantage, Part D, and other Medicare programs	Give away cash or other monetary rebates
Distribute Star Ratings information, Summary of Benefits, Pre-Enrollment Checklist, and the Multi-Language Insert with any enrollment form	Offer or subsidize meals or a combination of foods and beverages that could make it seem like you're offering meals

Collect lead cards and business reply cards	Require attendees to fill out a Scope of Appointment form or enrollment forms
Collect enrollment applications	Host a sales event within 12 hours of an educational event in the same building or any adjacent buildings
Use the necessary TPMO disclaimer on printed marketing materials	
Freely give out your business card to any attendee	
Arrange follow-up appointments & collect Scope of Appointment forms for future appointments	
Call attendees who attended a sales event if they gave express permission at the event for a follow-up call (you must have documented permission to contact)	