

Local Lead Guide

Proven Tactics to Help You Attract More Clients in Your Area

What Is This Guide?

Your ZIP code is your territory—and this guide is your playbook. Inside, you'll find simple, actionable strategies to build your brand, boost your visibility, and start generating quality leads right in your local community.

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“No fluff—just proven tactics that work in your own backyard.”

Local Presence Checklist

Want to show up when someone searches “Medicare help near me”? This section is your first step. Establishing and optimizing your digital footprint in your local area helps you build instant credibility and attract leads who are already looking for help.

Claim & Optimize Your Google Business Profile

Your Google Business Profile (GBP) is the most important free tool for local visibility. When someone Googles “Medicare agent near me,” your listing can show up in the top results with your reviews, contact info, hours, and more.

What to do:

- Visit google.com/business to claim your listing
- Add a professional headshot or logo, office hours, and a clear description of what you offer
- Choose the right categories (e.g., “Insurance Agency” or “Health Insurance Agency”)
- Add service areas (by ZIP code or city) to help show up in nearby searches
- Post updates regularly—Google rewards active profiles!

Pro tip: Include keywords like “Medicare plans” or “ACA coverage” in your business description.

Add Your Business to Yelp and Other Top Directories

Many people still use Yelp, Bing Places, Apple Maps, and other directories to find local professionals—especially on mobile.

Steps to take:

- Create or claim your profile on Yelp, Bing Places, and Apple Maps
- Make sure your business name, address, and phone number (NAP) are consistent across all platforms
- Add relevant business categories and upload professional photos
- Link back to your website to build SEO authority

Don’t forget niche directories like the **Better Business Bureau** or **local Chamber of Commerce** listings.

Local Presence Checklist

Use This Google Review Request Script to Build Credibility

Online reviews play a huge role in trust-building. A few good Google reviews can dramatically boost your profile's visibility and help prospects feel more confident about reaching out.

Here's a simple review request script you can text or email to happy clients:

"Hi [Client Name], I'm so glad I could help with your Medicare plan! If you had a good experience, would you mind leaving a quick Google review? It helps more people in [City] find the help they need. Here's the link: [Insert your Google review link]. Thank you!"

Tips:

- Ask right after a successful appointment or enrollment
- Make it easy with a direct link to your review form
- Don't be shy—people are happy to support you if you ask!

Use Local SEO Tips

Even if you don't have a website team, a few tweaks can help you rank better in local searches.

Quick wins:

- Add your city and ZIP code to page titles, meta descriptions, and footer
- Create a "Local Areas Served" section on your website listing nearby towns or neighborhoods
- Post blogs or updates with local terms like "Medicare help in [City]" or "Health plans for [Neighborhood] residents"
- Include your full NAP (name, address, phone) on every page of your site

Also update your social media bios with your location and specialty, e.g., "Independent Medicare Agent in Round Rock, TX." SEO is about relevance and proximity—make sure Google knows where you are and who you help.

Community Marketing Playbook

Get in front of real people with grassroots outreach that works.

There's no better way to build trust and visibility than showing up in your own community. Whether you're educating, collaborating, or simply making your name known, these grassroots strategies help position you as the go-to local expert.



Host Educational Events That Bring People In

Local workshops give you a chance to connect directly with potential clients in a no-pressure setting.

Popular topics:

- Medicare 101: Help residents understand their options
- ACA Enrollment Q&A: Explain Marketplace coverage in simple terms
- Life Insurance Basics: Show families how to protect their future

Where to host:

- Senior centers
- Community halls
- Libraries
- HOA clubhouses
- Your own office or a co-working space

Pro Tips:

- Keep it educational, not salesy—build trust first
- Offer free resources (e.g., a comparison chart or checklist)
- Collect contact info via a sign-in sheet or RSVP card

Community Marketing Playbook

Use Done-for-You Event Templates

You don't have to start from scratch. We've included professional templates you can personalize in minutes.

Included in this guide's resource kit:

- Editable flyers for Medicare 101s, Q&As, and seasonal sessions
- RSVP cards you can print or email
- Directional signage and table displays to make your event look polished

Distribution ideas:

- Drop flyers off at local senior centers, libraries, churches
- Post digital flyers on neighborhood Facebook groups and Nextdoor
- Hand them out at community bulletin boards or networking events

A polished event setup helps build instant credibility—even if it's your first time hosting.

How the PSM Marketing Hub works

PSM Marketing Hub

With **PSM Marketing Hub**, you have access to marketing materials customized by our in-house design team that will help save you time and money while increasing acquisition and retention.

Community Marketing Playbook

Partner with Local Organizations

When you team up with trusted community businesses, you gain instant access to their audience—and build your reputation by association.

Top local partner ideas:

- Clinics and urgent care centers
- Pharmacies (especially independents)
- Financial advisors and CPAs
- Churches or faith-based organizations
- Senior apartment communities

Collaboration examples:

- Offer to do a free Medicare Q&A for their clients
- Leave flyers or brochures at their front desk
- Host a joint event—“Health & Wealth” with a local CPA or “Medicare & Meds” with a pharmacist

Outreach script:

“Hi, I’m [Your Name], a local health insurance agent. I help folks in [City] understand their Medicare options. I’d love to connect and see if there’s a way we can collaborate to help the people you serve.”



Why This Works



Community outreach isn't just marketing—it's trust-building.

By becoming a visible, helpful resource in your area, you naturally attract the kind of clients who value local, personal service. The result? Stronger relationships, more referrals, and a growing reputation as the agent people recommend.

Hyper-Local Direct Mail Tips

Put your name in every mailbox—and get results.

Direct mail is far from dead—especially when it’s hyper-targeted, locally relevant, and consistently delivered. It’s a great way to build familiarity and trust in your community, especially among seniors and households who prefer printed information over digital.

🎯 Use ZIP Code Targeting to Reach Nearby Prospects

You don’t need a massive budget to make an impact. Focus your efforts on the neighborhoods that matter most—your local service area.

How to get started:

- Choose ZIP codes or carrier routes close to your office or target area
- Use demographic filters to focus on age, income, or homeownership (EDDM tools help with this)
- Send repeat mailings to the same routes—consistency increases recognition

Why it works:

- People are more likely to trust and respond to someone who’s nearby
- Local mailers don’t feel like spam—they feel relevant and accessible

Tip: Include your city or neighborhood name prominently in your design and messaging. It helps establish immediate familiarity.



Hyper-Local Direct Mail Tips



Craft Messaging That Speaks to Local Concerns

A good postcard doesn't just explain what you do—it shows people you understand what matters to them.

Include:

- A photo of you or your team (adds trust)
- A clear call to action (CTA): “Call today for a no-cost consultation”
- A Google review quote or testimonial from a local client



Use USPS Every Door Direct Mail (EDDM)

EDDM is a cost-effective tool that lets you blanket an area with your message—no list required.

How it works:

1. Go to eddm.usps.com
2. Enter your ZIP code(s) to select carrier routes
3. Filter by age, income, or household type
4. Upload your 6.5” x 9” (or similar) postcard artwork
5. Print and drop off at your local post office (or use a print partner to handle it all)

EDDM perks:

- No mailing list needed
- Postage as low as ~\$0.20 per piece
- Reach entire neighborhoods in a single campaign

Direct mail works best when paired with other strategies—like events or social media—so make sure your message matches what people see online and in person. Your goal is to become familiar, trusted, and easy to reach in your local market.

Social Media for Small Markets

Leverage Facebook Groups and Nextdoor

These platforms are goldmines for local engagement—especially in smaller towns or tightly knit neighborhoods.

Where to show up:

- Facebook community groups like “Georgetown Moms” or “Round Rock Neighborhood Watch”
- Buy/sell/trade groups (great for promoting educational events or offering free resources)
- Nextdoor: a hyper-local social network organized by neighborhood

How to engage:

- Comment on local posts and be helpful (e.g., answer insurance-related questions)
- Share value-based posts like “Top 5 Medicare FAQs” or “Enrollment Deadlines for [Your Area]”
- Avoid hard selling—think friendly, helpful neighbor

Tip: Use your real name and photo in these spaces to appear approachable and trustworthy.

Use Plug-and-Play Post Templates

Not sure what to post? We’ve made it easy with customizable templates tailored for local engagement.

Templates include:

- Event announcements (e.g., “Join us for a free Medicare 101 session at the library”)
- Client testimonials or reviews with permission
- “Did You Know?” tips about insurance benefits or deadlines
- Local shoutouts: “Big thanks to [local business] for hosting our workshop today!”

Social Media for Small Markets



Follow a Simple Weekly Content Calendar

Consistency is more important than frequency. A light, repeatable schedule helps keep you visible without burning out.

Sample Weekly Calendar:

- Monday – Insurance Tip of the Week
- Wednesday – Client testimonial or success story
- Friday – Weekend event promo or community post
- Bonus: Mix in one personal post each week (e.g., “Here’s my favorite coffee shop in [City]!”)

Pro Tip: Schedule your posts in advance using free tools like Meta Business Suite or Canva.

Staying consistent builds recognition—and when people are ready for help, you’ll be the first person they think of.

Final Thought

You don’t need to be an influencer. You just need to be active, authentic, and available. When your community sees your name regularly and associates it with helpful content, you earn trust—and trust turns into appointments.



Referral & Networking Blueprint



Referrals: Your Most Powerful Lead Source

Your best new clients are the ones who already trust you—because someone they know recommended you. But referrals don't always happen on their own—you have to ask (at the right time, in the right way).

Here's a referral script you can use after a successful appointment:

"I'm really glad we were able to find the right plan for you today. If you know anyone else in [City] who has questions about Medicare or health insurance, I'd be happy to help them too. Feel free to pass along my info—or I can give you a few of my cards to share."

Tips for more referrals:

- Include a referral line in your follow-up email: "Referrals are the highest compliment I can receive."
- Offer a small thank-you gift for each successful referral (where compliant)
- Make it easy to share your contact info—business cards, textable links, or even fridge magnets

Pro Tip: The best time to ask for a referral is right after solving a client's problem.

Referrals are the lifeblood of any successful local business. By systemizing your asks and forming a reliable partner network, you create a steady stream of warm leads—without spending a dime on ads. PSM Brokerage is here to help you build that referral engine with the tools, templates, and support you need to turn relationships into reliable growth.

Referral & Networking Blueprint

Build a “Power Team” of Local Partners

Think beyond clients—there are other trusted professionals in your community who serve the same audience. Build a referral loop with them.

Potential partners include:

- Financial advisors and CPAs
- Dentists and vision care providers
- Real estate agents
- Home care companies
- Pharmacists or independent clinic owners

What to say when reaching out:

“Hi [Name], I work with people in [City] who are navigating Medicare and health coverage. I think there’s a great opportunity for us to refer business back and forth. Would you be open to chatting about how we can support each other’s clients?”

Partner ideas:

- Swap flyers or business cards to display in each other’s offices
- Co-host educational events (e.g., Medicare + Financial Planning)
- Promote each other on social media

Create a Co-Branded Flyer to Promote Your Network

When clients trust you, they’ll also trust the people you trust. That’s why creating a “Power Team” flyer is so effective—it positions you and your partners as a united front of credible, helpful professionals in your area.

Think of this like forming a “local advisory board” where everyone helps everyone grow.

Customizable Local Ad Templates

Our Value-Added Services empower you to grow your business through professional social media campaigns, engaging email outreach, and impactful webinar presentations.



Ready to Own Your Zipcode

You've built your presence, planned your outreach—now it's time to advertise like a pro.

The [PSM Marketing Hub](#) is your all-in-one resource for professional, ready-to-use marketing materials designed to help you attract more clients and grow your brand with confidence. Whether you need branded flyers, social media content, direct mail pieces, or event materials, our in-house design team creates polished, compliant assets tailored to your market and style.

Best of all—it's a no-cost service for agents working with PSM.

Included in your toolkit:

- Local Facebook Ad mockups with editable text
- “Get Help Near You” headline ideas that are proven to convert
- Smart targeting strategies based on your region and enrollment seasons

Whether you're promoting AEP, SEP, or just looking to build year-round visibility, these customizable ad tools help you reach the right audience—right where they are. Start building a local presence that gets you noticed, trusted, and referred.

Your brand deserves to stand out—**and we're here to make that happen.**

Get started on your campaign



Scan the QR code or [click here](#) to schedule a marketing review.

