

The background features a light blue architectural floor plan with various rooms, corridors, and a central staircase. A compass rose is visible in the upper right quadrant. A soft, light green watercolor splash is located in the bottom left corner.

How to Plan an Insurance Seminar that Fills Seats



3

One Room Outperforms Weeks of Cold Outreach

Twenty to forty prospects in front of a trusted voice

Produces more booked appointments than 3 weeks of standard outreach

Planning decisions dictate a packed house versus an empty room

Pick Your Rules Before You Plan

CMS enforces two distinct sets of rules
for Medicare events

Format dictates everything from venue
choice to lectern script

Choose the Format That Fits Your Goal

Educational Event:

Plan and carrier neutral. No specific benefits or one-on-one appointments.

Captures follow-ups for a future review to build trust.

Sales Event:

Discuss specific plans and benefits. Collect SOAs and schedule immediate follow-ups.

Carries strict disclaimers but higher sales freedom.



Aligning the Topic With the Rules

- 2026 CMS rules strictly separate educational language from marketing
- Educational topics address category-level confusion, not specific plans
- Sales topics offer specific plan reviews in exchange for heavier disclaimers

Three Rules for Booking the Room

- Comfort: Pick accessible public venues, avoid stairs or gated lots

- Scale: Size the room to  of your target attendance

- Permissions: Confirm food and activity rules before signing contracts



Lock the Calendar Early

- Target weekday late mornings, lunches, or early evenings
- Avoid weekends, Friday afternoons, and nighttime driving hours
- Commit to the date at least 4 weeks out for mail lead time

Calculate Your Mail Target

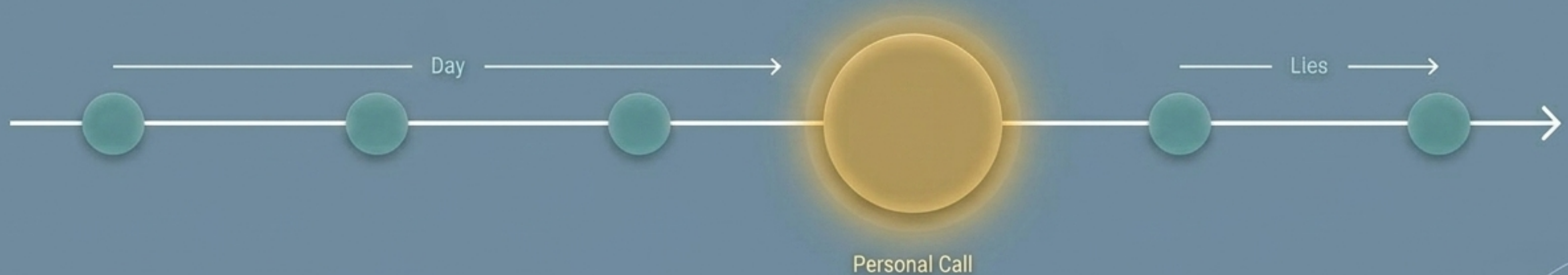


Layered Channels Fill Faster

- Drop direct mail in two waves: 21 days out and 10 days out
- Layer targeted Facebook ads inside a tight radius in combined force
- Combined channels lower the overall cost per registration

The Sequence That Doubles the Show Rate

- ▶ Automate five touches between registration and the door
- ▶ Make one brief personal call 48 to 72 hours out
- ▶ Block time strictly for calling to push attendance to 50% or higher



Controlling the Pre-Event Experience



Arrive 90 minutes early to test technology and walk the room



Remove excess chairs to visually force a full room



Deploy sign-in sheets as your compliant follow-up funnel



Serve light refreshments to build hospitality

Respect the Clock

- Start exactly five minutes after the posted time
- Deliver 45 minutes of content
- Hold 15 minutes of question and answer
- A clean close preserves your show rate for future events

45

15

Stop Running One-Shots

Profitable agents run a series in the same room, on the same day
Repetition lowers acquisition cost as local recognition builds
Treat the seminar as a permanent installation, not a single event



Action Step

- ✓ Pick educational or sales format
- ✓ Lock a date four to six weeks out
- ✓ Place a tentative hold on a venue
- ✓ Let the timeline force the remaining details into place