

How to Convert Event Attendees Into Insurance Clients



The Presentation Is Not the Hard Part

You filled the room. You delivered the presentation. Now what?



The Brutal Math of Event ROI

The cost of the event (room rent, food, marketing, preparation) **does not change.**

Sloppy Follow-up

0-1

Appointments

Sharp Follow-up

4-6

Appointments

The only variable that moves your return on investment is what you do in the 72 hours after the event ends.

Reframing the Fear of Being Pushy



You do not want to chase, beg, or feel like a salesperson.



You are not chasing. You are following through on a promise you made in the room.

Step 1: Set Up the Close Inside the Presentation

If anything you have heard tonight raises questions about your specific situation, the next step is a 30-minute one-on-one review.

Names the next step.

It is private, it is no cost, and you walk away knowing exactly where you stand.

Removes the financial barrier.




Tells them the benefit.

Plant this sentence two-thirds of the way through, and reinforce it in the close.

Step 2: The Permission to Contact Form

For Medicare events, this is non-negotiable. Without written PTC, you legally cannot follow up.

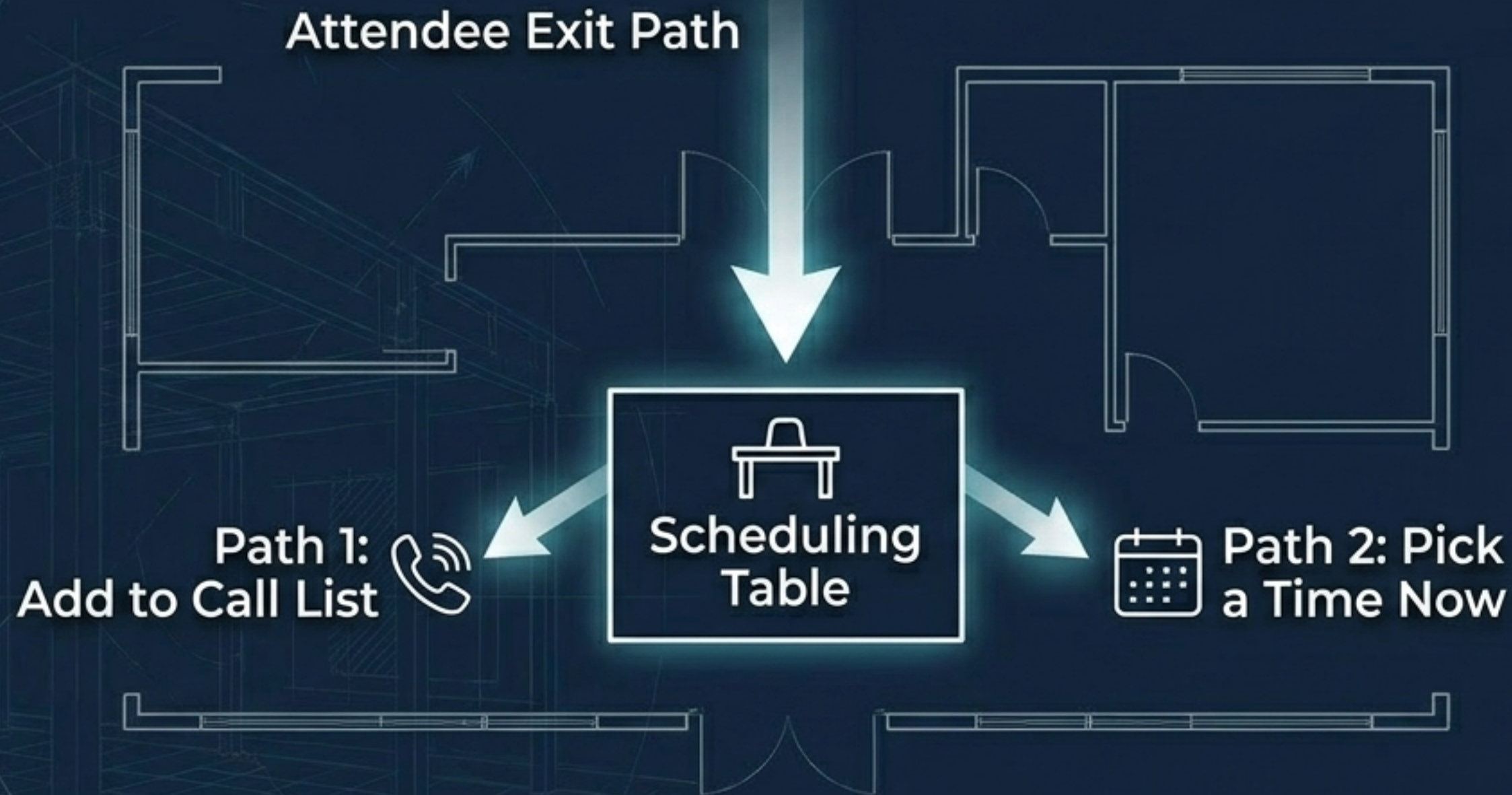
Hand out a specific PTC card, not a sign-in sheet. Ensure the attendee checks their preferred contact methods.

<input type="checkbox"/>		Phone
<input type="checkbox"/>		Email
<input type="checkbox"/>		Mail

Always check current CMS guidelines and carrier requirements. No card, no follow-up.

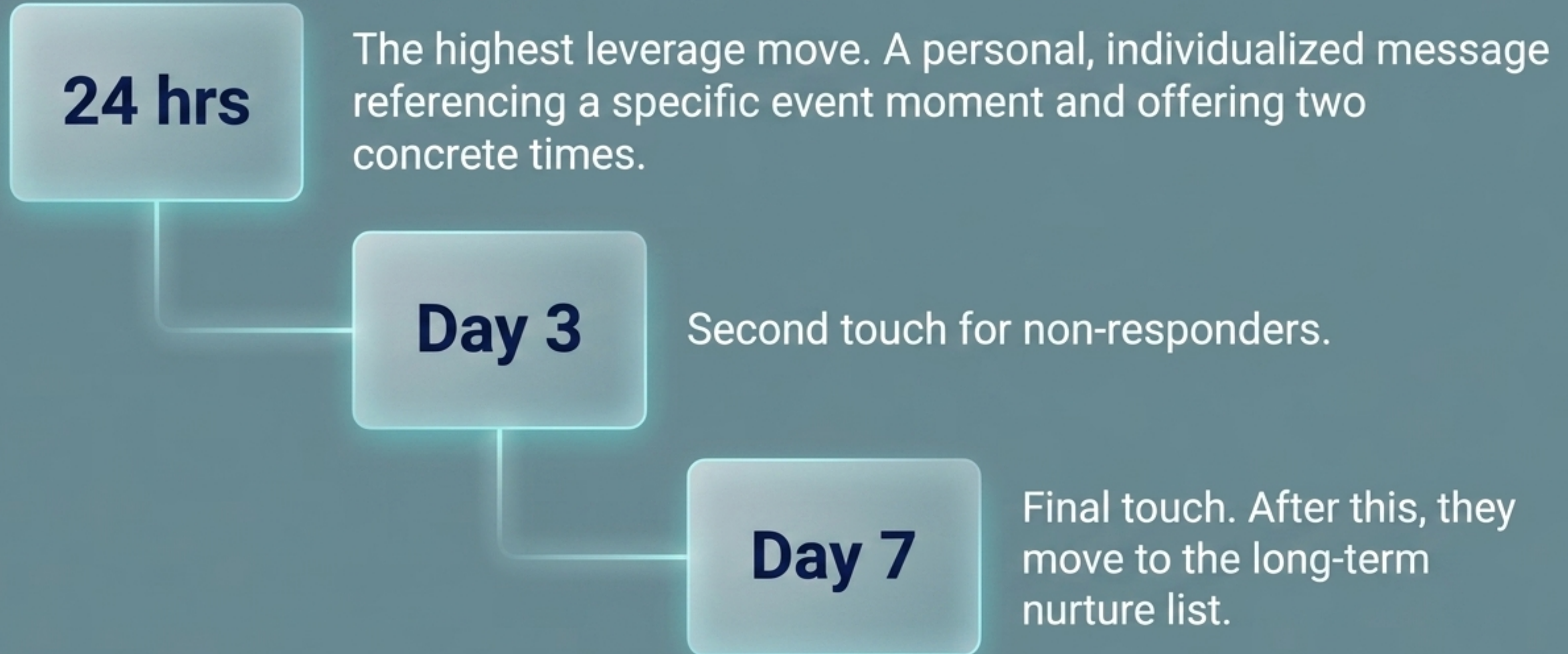
Plant this sentence two-thirds of the way through, and reinforce it in the close.

Step 3: The Exit Crossroads



Set up the table near the exit with your calendar, appointment cards, and Scope of Appointment (SOA) forms. Make it easier to say yes than to say wait.

Step 4: The 7-Day Follow-Up Cadence

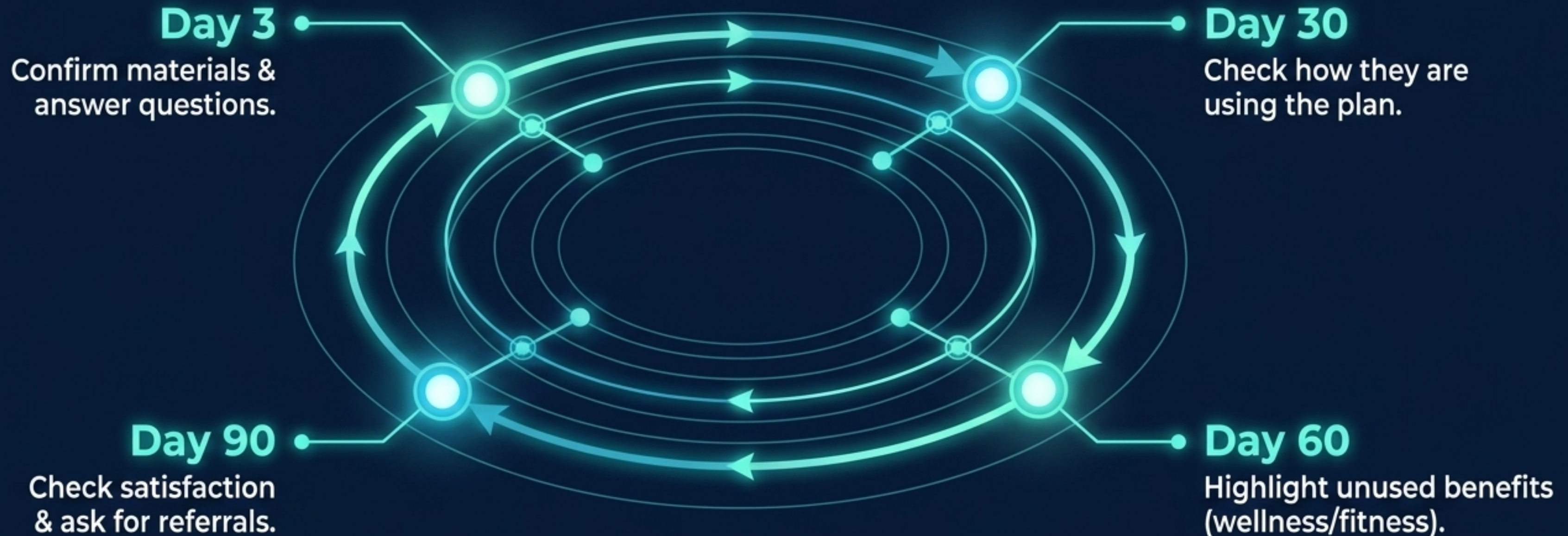


Step 5: The Conversion Call Structure



For Medicare conversations, the Scope of Appointment must be signed before any plan-specific discussion.

Step 6: The Post-Enrollment Loop



Put the dates in your calendar at the moment of enrollment.
This loop builds a referral business inside of two years.

The Event Conversion System in Action



The difference between an event as a one-time activity and an event as a compounding system.

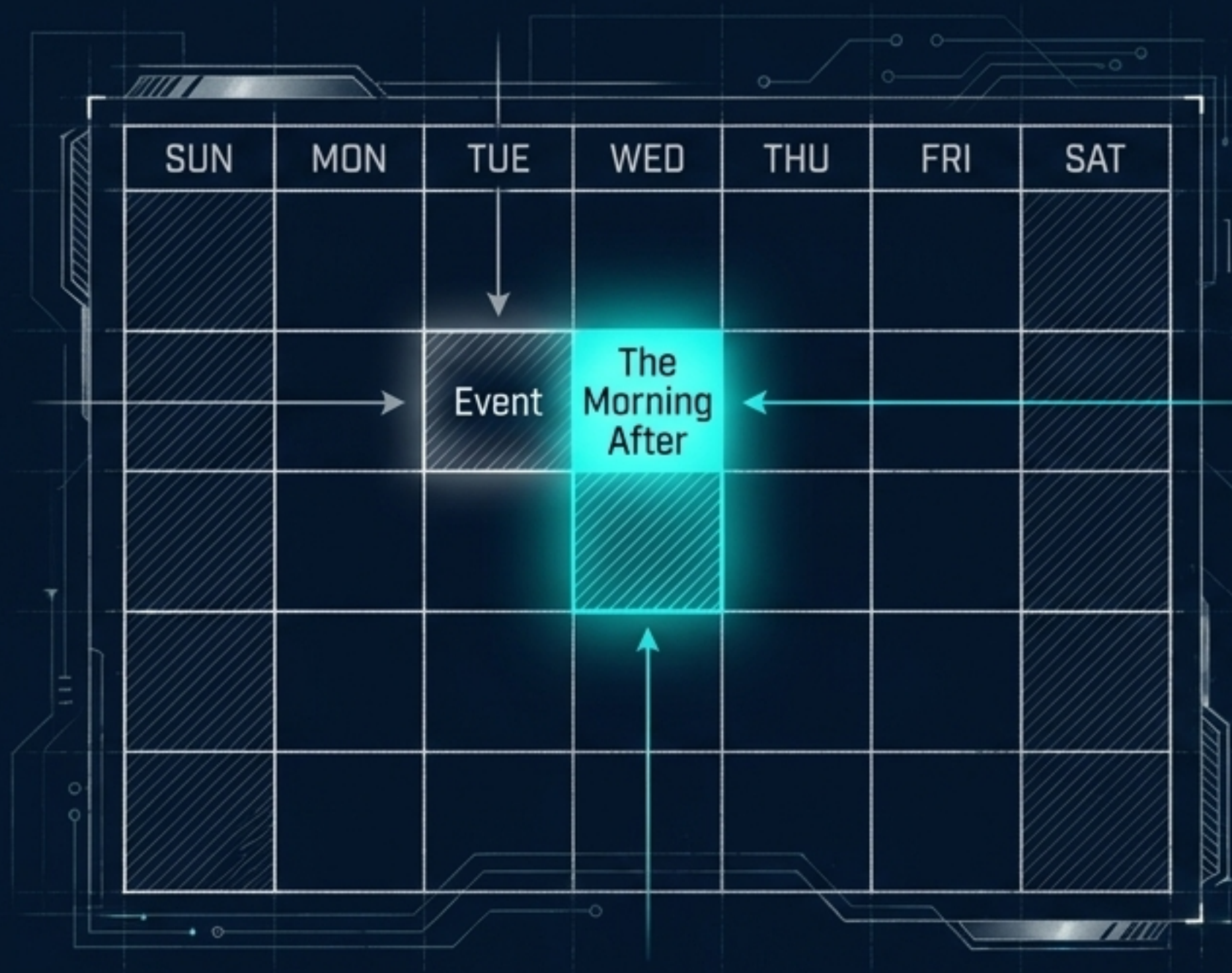
Two Execution Failures to Avoid

Waiting Out the Weekend

Monday is too late. The attendee is too late. The attendee has moved on. Follow-up must happen within 24 hours.

Skipping the Exit Table

Running an event without a scheduling table kills immediate bookings. Set it up every time. No exceptions.



Your 72-Hour Action Plan

If you have an event in the next 30 days:

- 1. Build and print your Permission to Contact cards.
- 2. Prepare Scope of Appointment forms for the back table.
- 3. Block the morning after the event as protected follow-up time.

The room fills the same way. What changes is what you do in the 72 hours after it empties.