



How To Use Aged Medicare Leads To Fill Educational Events Under The New CMS Rules

Description

By James Schulze

This article discusses how CMS's changes for the 2027 contract year are bringing back educational events as one of the most effective Medicare marketing tools. It also shares how agents can use aged Medicare leads to build up attendance and then stay engaged with seniors after the event, driving up their enrollments for the 2027 AEP.

When the Centers For Medicare & Medicaid Services (CMS) finalized its 2027 Medicare marketing [rules](#), much of the industry's attention focused on the elimination of the 48-hour Scope of Appointment waiting period and the removal of restrictions that separated educational and marketing events (for more information on the changes, read our [blog](#), "Why The 2027 CMS Medicare Rule Is Good News For Medicare Lead Buyers"). These changes make educational seminars one of the most effective Medicare marketing strategies in years.

But successful seminars don't happen because you rent a room. They happen because people show up. The Medicare industry has faced significant challenges in this decade. From COVID which reduced headcount at a typical seminar from 50-plus seniors to 10 to 20 to the CMS restrictions on Medicare educational events, enrolling consumers at Medicare events has been a massive challenge.

One of the most overlooked ways to build attendance is by using aged Medicare data leads. Not simply to generate appointments, but to build a local audience before, during, and after every event.

Educational events are back

CMS removed several restrictions that previously made educational events less efficient. Today, agencies can:

- Hold educational and marketing events closer together
- Collect Scopes of Appointment more efficiently
- Move interested beneficiaries into the sales process much faster

This changes the economics of Medicare seminars. Instead of viewing them strictly as branding events, agencies can once again use them as an effective Medicare lead generation channel.

The biggest challenge isn't the seminar

The biggest challenge is filling the room. Many agencies spend thousands of dollars renting conference rooms, purchasing refreshments, printing materials, and scheduling licensed agents. Then only 15 people attend. The seminar wasn't the problem. The marketing was. In the past, agents would resort to neighborhood signage and flyers, but efficient use of opt-in Medicare leads is a far better approach. Medicare agents can purchase recent opt-in aged Medicare leads and utilize SMS platforms like Sales God to invite consumers, send reminders, and manage follow-ups.

Why aged Medicare leads work so well

Most agencies think of aged Medicare leads as old sales opportunities, but aged Medicare leads are actually something much more valuable. They're an audience.

Aged Medicare leads are perfect for senior events. Medicare agents need to build a book, which is a long-term strategy that matches perfectly with The Leads Warehouse's research showing 80% of deals close between touches 5 and 12 (Ask for [The Leads Warehouse's](#) matrix of the number of calls vs. connections vs. contacts to closes). The initial SMS invite is the first touch. Reminders can be the second and third touches. And, the event is the fourth consumer touchpoint. Post-event follow-ups and enrollment meetings allow an individual Medicare agent to go deep into a cadence to enroll seniors.

Aged Medicare leads coupled with the right tech like Sales God turns a half-empty room into a bustling marketplace of new enrollees.

Build your event before it happens

Aged Medicare leads allow agencies to build awareness weeks before the seminar. Use your data to:

- Invite previous Medicare inquiries
- Send email reminders
- Deliver compliant text message reminders
- Make outbound reminder calls
- Mail invitations to high-value prospects
- Segment invitations by geography and age

Instead of hoping people discover your seminar, invite the exact consumers most likely to attend.

The event is only half the opportunity

Here's where many agencies stop. Someone doesn't attend. They move on. That's a mistake. Your attendee list and your no-show list are both valuable marketing assets. At The Leads Warehouse, our studies show that **80%** of salespeople stop after two contacts, but **90%** of consumers respond with six or more contacts. Stopping after the first round of outreach means an agent can miss up to **90%** of their potential customers.

Remarketing to the no-shows

Remarketing to people who did not attend your event may be the biggest opportunity created by the new CMS rules. Consumers who registered but never attended have already demonstrated interest. Follow up with a "sorry we missed you" message that includes:

- Key Medicare updates
- Presentation highlights
- Frequently asked questions
- Next seminar dates
- Appointment availability

The seminar becomes another marketing touchpoint, not the end of the campaign. At The Leads Warehouse, we believe in the value of aged leads, as **50%** of consumers take over 90 days to make a purchasing decision, regardless of the product. SMS and email drip campaigns keep an agent front and center for when the consumer is ready to make a decision.

Turn one seminar into months of marketing

A single educational event can produce multiple campaigns to help keep attendees and even non-attending seniors engaged. For example:

Before the seminar: Send invitations, reminder emails, reminder texts, and reminder calls.

Immediately after: Send messages to thank attendees, schedule appointments, and follow up on Scopes of Appointment.

Outreaches to no-shows: Send messages that include "here's what you missed" content, educational recaps, video replays, and invitations to upcoming events.

Build communities, not just sales pipelines

The agencies that consistently grow Medicare sales aren't always the ones buying the most expensive leads. They're the ones creating repeated opportunities to educate beneficiaries. Educational seminars create trust. Aged Medicare leads fill seminars. Consistent follow-up turns attendees into clients.

The new CMS rules simply make that process more efficient than it has been in years. Aged Medicare leads allow an agent to actually develop a rapport and create a relationship with the senior rather than just cold outreach and impersonal service.

Looking ahead to AEP

With the 2027 Annual Enrollment Period (AEP) approaching, agencies should begin building seminar schedules now. That includes:

- Securing event locations
- Purchasing aged Medicare data
- Segmenting invitation lists
- Updating email campaigns
- Reviewing text messaging compliance
- Training agents
- Preparing presentation materials

The organizations that begin building audiences today will likely have fuller rooms and more selling opportunities when enrollment season arrives.

Proper Medicare AEP planning begins with securing aged Medicare leads and ensuring the agency's tech stack is ready to go. SMS platforms like Sales God handle the A2P and 10DLC requirements. Checking domain status to deliver emails needs to begin in July, not the week of AEP. Caller ID management is an ongoing process.

Scripts also need to be vetted and prepared. Different seniors reply to different messaging. A variety of scripts should be written now, not later.

Conclusion

The 2027 CMS marketing changes didn't just simplify Medicare compliance. They restored educational events as one of the industry's most effective marketing channels. But educational events don't fill themselves. Agencies that strategically use aged Medicare data leads before the event, during the enrollment process, and after the seminar ends can create a repeatable marketing system that continues generating appointments long after the chairs are folded and the room is empty. Are you ready to talk about how you can grow your Medicare sales pipeline?

About the author

James Schulze is the President and CEO of The Leads Warehouse, a marketing data company with over 20 years of experience in bringing lead generation solutions to companies selling into the home, automotive, financial, insurance, health and life, and legal sectors. He works directly with clients to optimize conversion strategies and ROI across multiple verticals.

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