



WTM Program Guidelines & Rules

Scheduling

- Approved agents can host up to two meetings per month for their first three months in the Welcome to Medicare (WTM) program. After three months, the agent may request an additional meeting and will get confirmation from Carolina Senior Marketing (CSM) on approval of additional meeting requests.
- Agents must submit any meetings requiring postcard advertising at least five weeks prior to the event date to allow for proper preparation and advertising time.
- If you are planning to host at a brand new location, check on availability of the venue before scheduling by emailing wtm@carolinaseniormarketing.com.
- Agents must promptly report meeting results to CSM before scheduling any more meetings. CSM will not advertise for upcoming meetings if we have not obtained previous results. This includes completing our [Agent Reimbursement Form](#) as well as properly dispositioning your leads in the "status" column of your RSVP sheet.
- Meeting locations must be within 60 miles of the agent's home base, where business is primarily conducted.
- If an agent has not hosted at a location for 60+ days, CSM may consider that location available for other meetings.
- Agents must coordinate with restaurant management and reserve locations themselves.
- If a meeting needs to be changed or cancelled, immediately submit a cancel/change form from the WTM page in your agent portal or email ASAP wtm@carolinaseniormarketing.com.

Reimbursements

- CSM will reimburse for up to \$30 per attendee. This amount includes meal, drink, tax, tip, and any additional fees. Any amount over \$30 per attendee will not be reimbursed. Per CMS nominal gift value rules, meals should not exceed \$15/attendee.
- One meal per agent may also be submitted for reimbursement. Please include yourself in your reported attendance numbers if you have a meal and wish to be reimbursed.
- You must submit your meeting expenses by the end of each month using the [Agent Reimbursement Form](#). Please submit one expense report per meeting. Reimbursements are processed within a week via direct deposit.
- You will be emailed when your reimbursement is processed by our accounting department. We will move your meeting to the Reimbursed section of your WTM portal with the amounts paid.
- If no one attends your scheduled meeting, and you therefore have no reimbursement request, still report your results to CSM using the [Agent Reimbursement Form](#).

Advertising

- CSM has the authority to determine the best avenues for marketing for these events based on our key performance indicators (Facebook, postcards, email, etc).
- It is the agent's responsibility to review any postcard proof for accuracy before print.
- It is the agent's responsibility to accurately enter their confirmed meeting dates into the **New Meeting Form**.
- Agents understand that while CSM aims to target individuals turning 65 within three to six months of meetings dates, prospects may attend who are currently on Medicare or not eligible for many months due to current digital marketing restrictions.
- Agents will make every effort to capture valuable marketing information, by setting out sign-in sheets, keeping track of their attendance numbers, and reporting results back to CSM in a timely manner.
- Facebook campaigns begin running 10 days before each meeting date.
- Postcards are typically delivered to mailboxes 10-12 days before each meeting date.
- Next month's meeting dates are added to your RSVP form around the middle of the prior month. (For example, March dates are added around February 15.)
- CSM monitors online RSVPs and increases campaign spend when needed to help drive additional responses.
- Hosting agents may pay to boost their own campaigns by submitting the meeting boost form on wtmresources.com. Allow 24 hours for the boost to take effect.
- CSM is happy to offer guidance and suggestions along the way to make each meeting successful!

*Everything you need to plan
your most successful meetings.*



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