Begin with a purpose and permission

Choose one audience, one useful message and one next step. A simple, approved process is easier to test and repeat.

Try one grassroots action

- Ask a local organization whether an appropriate educational resource or introduction would be useful.
- Agree on the audience, format and approvals before arranging a session or leaving materials.
- Use approved materials and a clear agency identity. Let interested people choose whether and how to contact you.
- Record permitted follow-up in your approved system. Do not treat attendance, a social-media like or a shared list as permission to call or text.

Medicare advertising: check before you publish

Medicare Advantage and Part D advertising is subject to CMS marketing rules and applicable carrier review. Ask your FMO (field marketing organization) compliance contact to confirm the current TPMO (third-party marketing organization) disclosure, plan-year timing, permitted audience/contact methods and submission or approval process. Do not use plan-specific claims without required carrier approval. For leads, document permission to contact the named agent or agency for the stated products and channels; obtain separate prior express written consent for each TPMO receiving shared beneficiary data. A purchased list or platform lead form alone does not establish compliant one-to-one consent. Medigap follows state insurance rules; confirm that scope separately.

Choose the next step

Audience / question they need answered: _____

Useful resource / requested action: _____

Compliance contact / approval evidence: _____

Source (checked 21 Sept 2026): CMS: Medicare marketing guidelines
https://www.cms.gov/medicare/health-drug-plans/managed-care-marketing/medicare-guidelines

Your first small paid-ad test

Plan the test before spending. The owner approves the total budget; platform approval does not replace insurance compliance review.

Six steps to a manageable test

- 1. Choose one result: visits to an approved educational page or properly consented inquiries. Decide what counts before launching.
- 2. Prepare the destination: readable on a phone, accurate contact details, privacy information and reviewed consent where information is collected.
- 3. Open the platform's ad manager. Choose the objective that matches the result. Read its current advertising and targeting rules, including any required special category.
- 4. Set the permitted audience, a total spending limit, start/end dates and who will answer inquiries. Use blank planning fields; do not upload client lists.
- 5. Add the approved copy and image, preview on a phone and desktop, test the link, and record any required approvals before submitting.
- 6. Review spend and useful responses on an agreed date. Pause for broken links, complaints or exhausted budget. Change one thing at a time; do not treat clicks as sales.

If you want help

Use the platform's official learning resources or ask a qualified advertising professional to work within your approved scope and budget. Sprouts CRM is coming from Bloom. Details will be shared when ready; it has not launched. Write down the follow-up or organization problem you want help with now.

Keep the test clear

Goal / total budget / end date: _____

Person answering / review date / stop condition: _____

Source (checked 21 Sept 2026): Meta: Business learning resources (may require sign-in)
https://www.facebook.com/business/learn