



Premium Lead Solutions

EXCLUSIVE LEADS PROVIDER

Health Insurance Lead Generation Sample

Introduction (For All Scenarios)

Hi, this is [Your Name] from [Company Name]. How are you today?

[Pause for response.]

I'm reaching out because we provide affordable health insurance plans for residents of your state. Our plans can help ensure your family is protected in case of medical emergencies or unexpected health expenses.

Before we proceed, I just need to ask a few questions to find the best plan for you.

Information Gathering (For All Scenarios)

- 1. Full Name:**
Could you please confirm your full name?
 - 2. Date of Birth:**
May I ask your date of birth to ensure you qualify for the appropriate health insurance plan?
 - 3. Address:**
Can I confirm your address to ensure we have your correct location?
 - 4. Beneficiary:**
In case of health-related emergencies, who would be the beneficiary of your health insurance policy?
 - 5. Coverage Needs:**
Are you looking for coverage for yourself or your entire family?
 - 6. Smoker or Non-Smoker:**
Are you currently a smoker or a non-smoker?
 - 7. Active Checking or Savings Account:**
Do you have an active checking or savings account for making payments?
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Qualification Questions (For All Scenarios)

1. Are you or anyone in your household currently on Medicare, Medicaid, Disability, or any state-funded insurance?
 - If NO: Proceed to the next question.
 - If YES: Unfortunately, we can't offer you any additional coverage. Thank you for your time!
2. Are you ready to start a new health insurance policy within the next 30 days?
 - If YES: Proceed to the next question.
 - If NO: Would it be okay if I call you back closer to when you're ready to purchase? [Try to schedule a callback.]
3. Is your household income above \$30,000 per year?
 - If YES: Proceed to the next question.
 - If NO: Unfortunately, we may not have suitable options for you at this time. Thank you for your time!
4. Are you looking for only Dental or Maternity benefits?
 - If NO: Proceed to the next question.
 - If YES: We can offer general health insurance with the option to add dental coverage for an additional fee, but we don't provide stand-alone dental or maternity plans. Would you still be interested in this coverage?
5. Can you budget \$150 per month for a single plan or \$300 per month for a family plan?
 - If YES: Proceed to the next question.
 - If NO: Unfortunately, we may not be able to help at this time. Thank you for your time!
6. Do you have a credit or debit card available for monthly payments?
 - If YES: Proceed to the next question.
 - If NO: Unfortunately, we require a credit or debit card for payments. Thank you for your time!

1. Callback Lead Handling (Health Insurance)

Step 1: Confirm Interest

- Are you still interested in exploring health insurance options for you or your family?

Step 2: Schedule a Callback

- When would be the best time for our licensed agent to call you back to go over your options?
 - Morning
 - Afternoon
 - Evening

Step 3: Verify Details

- Let's confirm your details for the callback:
 - Full Name
 - Date of Birth
 - Address
 - Beneficiary
 - Coverage Needs
 - Smoker/Non-Smoker
 - Checking/Savings Account

Step 4: Close the Conversation

- Great! You'll receive a call from our agent [Agent Name] on [Scheduled Time]. Please expect the call, and thank you for your time!
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2. In-Person Appointment Handling (Health Insurance)

Step 1: Offer an In-Person Meeting

- If you'd prefer, we can schedule an in-person appointment with one of our licensed agents to walk you through the health insurance options and help you choose the right plan. Does that sound good?

Step 2: Schedule the Appointment

- What day and time would work best for an in-person appointment?
 - Option 1: [Date/Time]
 - Option 2: [Date/Time]

Step 3: Verify Details

- Let's confirm your details to ensure everything is set for the meeting:
 - Full Name
 - Date of Birth
 - Address
 - Beneficiary
 - Coverage Needs

- Smoker/Non-Smoker
- Checking/Savings Account

Step 4: Confirm Appointment

- You're all set for an appointment with [Agent Name] on [Date/Time] at [Location]. Please let us know if anything changes.
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3. Live Transfer Handling (Health Insurance)

Step 1: Live Transfer Introduction

- Since you qualify, I can transfer you to a specialist right now to discuss your health insurance options in more detail. Do you have a few minutes to speak with them?

Step 2: Verify Details

- Before I transfer you, let's quickly confirm your information:
 - Full Name
 - Date of Birth
 - Address
 - Beneficiary
 - Coverage Needs
 - Smoker/Non-Smoker
 - Checking/Savings Account

Step 3: Initiate the Transfer

- Great! I'll transfer you now to [Agent Name], who will go over your health insurance options and answer any questions you have.

Step 4: Close the Transfer

- Thank you for your time, [Prospect Name]. You'll be speaking with [Agent Name] shortly, and they'll assist you from here.
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Common Rebuttals (For All Scenarios)

- **Not Interested:**
"I understand, but health insurance is critical for protecting your family from unexpected medical expenses. Would you be open to exploring some affordable options at a later time?"

- **Already Have Health Insurance:**

"That's great! Many of our clients already had insurance but found that our plans offered better coverage or lower premiums. Would you like to compare options?"

- **Can't Afford Health Insurance:**

"I understand, but we have plans starting as low as \$150 per month. Could we schedule a quick call to explore those options?"

- **How Did You Get My Information?:**

"We usually receive information through online requests or from databases that help people find affordable health insurance."

Final Confirmation (For All Scenarios)

Before ending the conversation, confirm the following details:

1. Full Name
2. Date of Birth
3. Address
4. Beneficiary
5. Coverage Needs
6. Smoker/Non-Smoker Status
7. Active Checking or Savings Account
8. Next Steps (Callback, In-Person Appointment, or Live Transfer)

Closing Statement

Thank you again for your time, [Prospect Name]. We're committed to helping you find the best health insurance plan for your family's needs. If you have any further questions, feel free to contact us at [Phone Number]. Have a great day!