



Premium Lead Solutions

EXCLUSIVE LEADS PROVIDER

Medicare Lead Generation Sample

Introduction (For All Scenarios)

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

[Pause for response.]

I'm calling to let you know that rates on Secondary Medicare Insurance have recently dropped by up to 35%, and there are new updated plans in your area. These plans can offer additional benefits like dental, vision, hearing, and transportation, all at no extra cost on top of your existing policy. In many cases, they may also lower your monthly premium.

Before I connect you with an agent, I just need to ask a few quick questions to ensure we find the right plan for you.

Qualification Questions (For All Scenarios)

1. Do you currently have Medicare Parts A & B active?
 - If YES, proceed.
 - If NO, unfortunately, you'll need Parts A & B to qualify for these benefits.
 2. Is your monthly income below \$1,300?
 - If YES, proceed.
 - If NO, continue with the next question.
 3. Do you have an Anthem Blue Cross plan, TRICARE, or Champ VA?
 - If NO, proceed.
 - If YES, unfortunately, we cannot offer additional coverage under those plans.
 4. Do you have a Power of Attorney, or does someone make decisions for you?
 - If NO, proceed.
 - If YES, you'll need them present to continue.
 5. If we find you a plan that offers more benefits and lowers your premium, would you consider switching to it?
 - If YES, proceed to the next step.
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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 plan?
 3. Address – Can I confirm your address to ensure we find plans available in your area?
 4. Favorite Color – For security purposes, could you provide your favorite color? This will be used as a password when our agent calls you back.
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Callback Lead Handling (Medicare Insurance)

Step 1: Confirm Interest

- Would you be interested in scheduling a callback to go over your Medicare options in more detail?

Step 2: Schedule a Callback

- When would be a good time for our licensed agent to call you back and go over the available Medicare plans?
 - Morning
 - Afternoon
 - Evening

Step 3: Verify Details

- Let me confirm your details for the callback:
 - Full Name
 - Date of Birth
 - Address
 - Favorite Color

Step 4: Close the Conversation

- Great! You'll receive a call from our agent [Agent Name] in the next 48 hours. When they call, they'll ask for your favorite color for security reasons. Please expect the call, and thank you for your time!
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In-Person Appointment Handling (Medicare Insurance)

Step 1: Offer an In-Person Appointment

- If you'd prefer, we can schedule an in-person meeting with one of our licensed agents to go over the Medicare plans and help you choose the best one. Would you be interested in meeting with us?

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 appointment:
 - Full Name
 - Date of Birth
 - Address
 - Favorite Color

Step 4: Confirm the Appointment

- You're all set for an appointment with [Agent Name] on [Date/Time] at [Location]. Please remember that the agent will ask for your favorite color as a security measure.
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Live Transfer Handling (Medicare Insurance)

Step 1: Live Transfer Introduction

- I can transfer you to one of our licensed agents right now, who can walk you through the Medicare options available and help you find the best coverage. Do you have a few minutes to speak with them now?

Step 2: Verify Details

- Before I transfer you, let's quickly confirm your information:
 - Full Name
 - Date of Birth
 - Address
 - Favorite Color

Step 3: Initiate the Transfer

- Great! I'll transfer you now to [Agent Name], who will go over the Medicare 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 Medicare plans have recently dropped in price and offer more coverage than ever before. Would you be open to learning more at a later time?"
 - **Already Have Medicare:**
"That's great! Many of our clients already had coverage, but we've helped them find plans with more benefits and lower premiums. Would you like to see how we could help you too?"
 - **Can't Afford Medicare:**
"I understand, but we have plans that could actually lower your monthly premium. Could we explore some of these options with you?"
 - **How Did You Get My Information?:**
"We usually receive information through online requests or databases that help individuals like yourself find affordable Medicare plans."
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Final Confirmation (For All Scenarios)

Before ending the conversation, confirm the following details:

1. Full Name
 2. Date of Birth
 3. Address
 4. Favorite Color (for security)
 5. Next Steps (Callback, In-Person Appointment, or Live Transfer)
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Closing Statement

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