

SCRIPT FOR TELEMARKETER

CALLING ON BEHALF OF LICENSED AGENT(S)

OPENING LINE:

Hi, this is *(your name)*. Just a quick courtesy call. Are you on a health insurance plan that you're happy with, or could you use help finding something affordable?

If they respond with interest, reply with:

Okay, well just so you know who I am, I'm calling on behalf of licensed agents with Compass Health Consultants. We have access to every type of health insurance available, so regardless of the budget or medical history, we'll make this easy, and help you find the right plan... I just have a few quick questions to see what you qualify for... *(proceed to "QUESTIONS FOR ALL LEAD TYPES" below...)*

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QUESTIONS FOR ALL LEAD TYPES (after either opening line above):

1. Do you have insurance currently?
(if so, ask: Are you happy with it? - if not, ask: How long have you been without?)
Keep nudging till they start talking. Listen for the pain, and/or challenges they've had in the past.
1. So that we can run some quotes for you, what's your home zip code?
2. Are you the only one who needs insurance, or do you have a spouse or kids that need it as well?
3. Nosy question - how old are you? *(also get ages/DOB's for spouse and/or kids if they are to be included)*
4. If we're able to find you the right plan, how soon do you need it to begin?
5. Do you (or family members to be insured) have any health conditions that we need to make sure are covered well?
6. What prescriptions have you filled at a pharmacy in the past 12 months?
(ask this about family members as well, if they're to be included – note all prescriptions and the health conditions they are for)

7. In the past 5 years have you (or family members to be included) had anything major happen, such as a hospitalization or surgery, or maybe a new diagnosis?
8. Any tobacco use in the past year?
9. Okay, we have numerous options in every price range, but we do want to make sure the cost doesn't create a burden for you financially... Have you thought about what would be comfortable for you on a monthly basis? That way we can focus on the options that are affordable to you..?

If they don't give you an actual number after you ask that question, then ask again, this way:

Again, we have options in literally about every price range, so is there a number that we need to be under, for this to make sense for you financially?

Get an actual number...

Okay, (customer name), I'm going to have one of our licensed agents, named (agent name), run some quotes and see which options are most affordable in your area. Then (s)he is going to call you back a little later today if that works, or would tomorrow morning be better?

Schedule a time for the agent follow-up call, allowing about a 1-hour window if possible, then...

I also want to give you (agent name's) direct phone number, in case you have any questions either before, or after you speak with him/her. Do you have a pen handy?

After they take down the number, confirm the time for the agent follow-up call, and say goodbye. Provide agent with all information gathered, and the appointment time, per that agent's instructions (ie: Calendly, text, etc).