



UNITED LEAD NETWORK  
EXCLUSIVE LEADS PROVIDER

# Health Insurance Lead Generation Sample

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## Introduction (For All Scenarios)

Hi, this is [Your Name] with the Health Enrollment Center. 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.

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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 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:

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!
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## 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."

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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. 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)
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### **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!