



UNITED LEAD NETWORK
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.

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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1. 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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2. 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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3. 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."

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!

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