



30-DAY CALLBACK SCRIPT FOR AN ISSUED POLICY

Making callbacks with newer clients is the best way to keep their business and fill holes in their coverage. The following are suggested phone talking points that cover typical topics and a recommended discussion flow. The key is to make this a conversation and get them involved.

After greeting them by name and introducing yourself and who you work for, state the purpose of your call:

I know we were able to get you approved with (*insurance carrier*) for your Medicare Supplement plan. We just like to check in about 30 days after your approval to make sure everything is okay and to see if you need anything.

Some typical topics you can use to break the ice and continue the conversation:

Have you had a chance to use the policy yet? Well, it's one of those things you don't want to use, but you're definitely happy to have it when you need it.

Were you able to get your previous policy cancelled? Good, we don't want you paying for two policies that do the same thing.

I hope we're saving you some money with this new plan. How much do you think you're saving? That's great.

Next, explore filling the holes in their coverage with an approach like this:

I'm looking at your file, and I don't see any (*missing coverage*). Many of our clients kill two birds with one stone and use the money they saved on medical to buy additional coverage in another area of their life like (*insurance type*).

You mentioned that this new coverage is saving you (dollar amount) a month. We offer (*coverage amount*) in (*insurance type*). Since you were just approved with (*insurance carrier*), you are likely eligible for this additional coverage.

It won't take very long to confirm you qualify for this additional coverage. If you do qualify, is there a particular family member or friend you'd like to protect by listing them as your beneficiary?

Finally, remember to never get pushy if they're not interested:

Not interested? That's no problem at all—we're just happy you're our client.

Remember, if you ever have questions or need anything, don't hesitate to call me.

Agents must be properly licensed in each jurisdiction where they and each consumer resides and ensure that all other marketing requirements are met, including with respect to federal and state privacy and telemarketing laws. Any outbound calls or texts must comply with federal, state and local restrictions and guidelines. Calls and texts are prohibited to numbers on state and federal do-not-call lists, and telemarketers must honor internal do-not-call lists. The use of auto-dialers to call or text must be limited to recipients who provided express written consent to be contacted about the products. Some jurisdictions prohibit calls to persons under a declared state of emergency. Callers must disclose the identity of the seller, the purpose of the call is to sell products and the products being offered.