

30 DAY CALLS

Hello, is this “*Mr. Jones*”- this is **(Your Name)** calling from **[Insert Agent’s Name]’s** office, your Medicare Agency.

[Insert Agent’s Name] recently helped you enroll in your new **[Insert Carrier]** plan that became effective **[effective date]** and I am calling to introduce myself and check-in on you.

Pause

Have you received your Welcome Packet and ID card yet?

If NO, it should be there soon but, in the meantime, here’s (insert Carrier & Customer services, #) to check on the mailing status. (When will it be here? -Depends on date of app submission. Check file.)

If YES, Great, just so you know the Customer Service # can easily be found on the back of your ID Card.

Many of your questions and concerns can be addressed by **[Insert Carrier]** Customer Service, so call them first but if you have any additional questions they couldn’t help with don’t hesitate to call us.

I also wanted to let you know that there are many commercials or even calls from other agents that you may run into. Just so you know, many of the benefits these plans are teasing you with may only be available to a small number of people in a few counties. However, if you have questions about what you are hearing please call us right away. If another plan is better for you and you are eligible, we’ll help you switch.

We DO represent all the plans available to you in our area and we try to help you select the plan with the richest benefits to fit your needs. Please remember, we are your Medicare partner. We will take care of you!

One of the special things we provide for our clients is plan check-up we call our “Review & Q’s.” This is a short phone call with one of our agents to do a quick review of your current plan & highlight some free benefits you may have forgotten you have. Our goal is to make you feel more in control of your insurance instead of the other way around.

Would you have time this week that we could schedule this short phone call?

If NO, Alright, that’s fine.

If YES, Great!

Pause to make appointment

We also want to remind you about our very helpful Facebook page and website stay connected with us.

Would you mind if I email or text you the Facebook and Website links? (Confirm email) We’d love it if you’d like and share our pages.

Lastly, we want to tell you about our Referral Program.

If you refer family, friends, or neighbors to us and they enroll in a Medicare plan, we will send you a \$15 Reward card. Can you think of anyone right now that could use some Medicare Advice? (ie, someone turning 65 in the next year, someone who's just moved in, anyone on Medicare and AHCCCS?)

If you think of someone that you would like to refer to us, please give them our # and have them call us. Due to Medicare rules, our agents can't call people to initiate the first contact. Do you still have some of our business cards to pass along?

Pause

Thank you for your time, again, my name is **(Your Name)**, thank you for letting us be your Medicare Agency.

VM:

Hello, is this *"Mr. Jones"*- this is **(Your Name)** calling from **[Insert Agent's Name]'s** office at CSG Medicare Pros.

Pause

[Insert Agent's Name] recently helped you enroll in your new **[Insert Carrier]** plan that became effective **[Effective Date]** and I'm calling to check in on you to make sure you have received your welcome packet and ID card from **[Insert Carrier]**. I have a few important things to go over with you about your plan, would you please give me a call back at **[928-263-8500 or 480-635-4050]**, as soon as you are able.

*****SPECIAL NOTE*****

Please add necessary notes to Outlook Appt/ AB Activities. Like FB, Texting, Email for Review & Q's

MONTH	CALL-IN
JAN	FEB
FEB	MAR
MAR	APR
APR	MAY
MAY	JUN
JUN	JUL
JUL	AUG
AUG	SEPT
SEPT	AEP-30
OCT	AEP-30
NOV	AEP-30

DEC	JAN
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