

COLD CALLING PHONE SCRIPT



The Brokerage Resource
Insurance Marketing Organization

Hello Mr./Ms. _____. This is _____, and I am an independent Insurance agent here in _____ (city/state).

I'm calling to talk to you about Medicare Supplement plans. Do you have a few minutes to speak with me? (Wait for response)

- (If yes) Great!
- (If not) When would be a good time for me to call you back?

Are you currently enrolled in Medicare? (Wait for response)

- (If yes) Very good. Do you know if you have the original Medicare Parts A and B, or do you currently have any additional coverage, such as a Medicare Supplement plan, Medicare Advantage or Prescription Drug plan? (Wait for response)
- (If no) Are you interested in learning more about Medicare because you'll soon be eligible to enroll in it? (Wait for response)

(If they want to learn more) If it's convenient with you, I'd like to schedule a call to tell you about all of the different plans available. This way I won't take up anymore of your time today. There is a lot of information, and we can look at the differences in plans and costs, and the benefits of each, in order to find the one that BEST meets YOUR needs.

I'll also tell you more about myself and my services, should you decide to purchase a Medicare Supplement plan. Would there be a time next week that might be convenient? (Wait for response)

Great! I'll call you on _____ at _____. (Wait for response) In the meantime, feel free to visit my website _____ to learn more about me and the services I provide.

Thank you so much for talking with me today, Mr./Ms. _____. I'm looking forward to speaking with you (day) _____. I will follow up with you via email to confirm our appointment. I hope you have a great (afternoon, evening, weekend).

