

Pre-Qualification Script for Live Transfer Medicare Leads

Below is the transcript used by lead providers to pre-qualify potential Medicare customers before transferring them to a licensed agent.

Greeting & Compliance Statement:

“Hi, this is [Agent Name] with [Lead Provider Company]. This call is being recorded and monitored for quality assurance. I’m not a licensed agent, but I will connect you with one if you qualify. Is that okay?”

[Wait for permission to continue]

1. 1. I have your name as [Name], is that correct?
2. 2. May I also confirm the state you reside in? Have you lived there for the last 30 days?
(Make note if they have recently moved.)
3. 3. I am calling on your request. Did you initiate the request for Medicare information?
4. 4. Do you make your own healthcare decisions?
5. 5. I have your birthdate and zip code on file. May I confirm both with you now?
6. 6. Can you confirm that you are not receiving health insurance from an employer or through military coverage such as TRICARE or VA benefits?
7. 7. Do you currently have both Medicare Part A and Part B?
8. 8. Have you made any Medicare plan changes in the last 30 days? If so, what changes were made?
9. 9. Do you agree to speak with one of our licensed agents? By doing so, you consent to receive communications via auto-dial, live calls, text messages, and email, even if your number is on the federal or national do-not-call list.