GPB Customer Service Courtesy Call Script for Retention & Final Expense

Part I

Hello may I speak to (Mr. Ms. Mrs.) ___________? This is Agent Name from Global Premier Benefits. We service your Medicare health insurance.....How are you today?

Happy Holiday’s to you and your family. Are you ready to bring in the New Year?

(make small talk BUILD rapport here!!!!)

I am calling today to ask you a few short questions about how you feel about your coverage.

OK? ___________________ And of course all calls are recorded for quality control purposes.

Was your enrollment agent polite and courteous? ________________________

Have you had a chance to use your Health Plan? ________________________

(if yes, let them explain.)

How was your experience with your Doctor or other providers that you used? (Let them talk) ___________________ ___________________ ___________________

Have you had a chance to use your Prescription Drug program? ________________________

So your overall experience has been good? ________________________

So you plan to stay enrolled in your plan this coming year? ________________________ That’s great!

Note: Questions about their plan direct them to Member Services

Part II

Have you heard of Cigna Supplemental Benefits? (let them answer). Benefits include hospital indemnity, cancer and final expense plans. ________________________

(Mr., Ms., Mrs.) ________________________ Did you know 41% of all Americans die without life insurance? Isn’t that a shame? ________________________ Do you know the reason is “they were pretty sure they wouldn’t die this year.” Isn’t that something? ________________________

So God forbid if you were to die tomorrow your family would most likely have to change their standard of living am I correct in saying that? ________________________

Did you know the avg. burial is well over $10,000? And Social Security only pays $255 but only if you qualify.

Go Into the Basic Final Expense Presentation.