

Phone Script – Psychology Behind the Medicare Call

Important things to remember when you are calling to set Medicare Appointment

- ❖ You are calling to set an appointment to go out and meet with them face to face, to review their current “**Medicare and You Book**”. As well as see if they qualify for any of the New Programs that are available to Seniors through their State (L.I.S. to help pay their Part B premium, or Tax Exceptions that they may not be aware of).
- ❖ **You are NOT Calling to:**
 - Pre-Qualify them over the phone.
 - Sell or Discuss products you sell.
 - Do a benefit price comparison of their current Med Sup or Med Advantage Plan.
- ❖ **They don’t know you, you’re a stranger who just called them.** They may not give you all their information or be completely truthful about everything over the phone. The only way to gain their trust is to meet with them and do a great warm up by using our “Understanding Medicare Video”, so they feel comfortable with you.

That being said, always remember that you’re in control. You’re calling to help them, you have something that they want and need. And that is your skill and product knowledge, It’s not the other way around. I’m not telling you to ever be rude or disrespectful on the phone. But you must remember that you are the person that has the Cookie and if they don’t act right, you will gladly take that Cookie away and offer it to someone else.

I only work with people that I like and that respect my time.

If you call someone and they are just rude or is angry on the phone? It’s OK to let them know that but do it in a polite way. You could say something like this. “Miss Johnson, it sounds like I caught you at a bad. Why don’t I do this, let me call you back later in the week when you have more time to talk. Is that OK?” I hang up on people I don’t let people hang up on me and ruin my attitude.

People work around my schedule. I don’t work my schedule around theirs.

I’m very busy, I work by appointment only just like every other professional. I’m like a doctor, I have certain times when I can see people. Either you fit in those times or I will call you back another day. Never be afraid to take the appointment away from some. If you try and push, push, push, to get the appointment people can tell that you’re desperate and they won’t respect your time. It’s OK to play hard to get.

Here is the most important thing to remember when your call.

Pretend like you’re talking to someone in your family that you actually like. That’s how relax you need to be on the phone.