

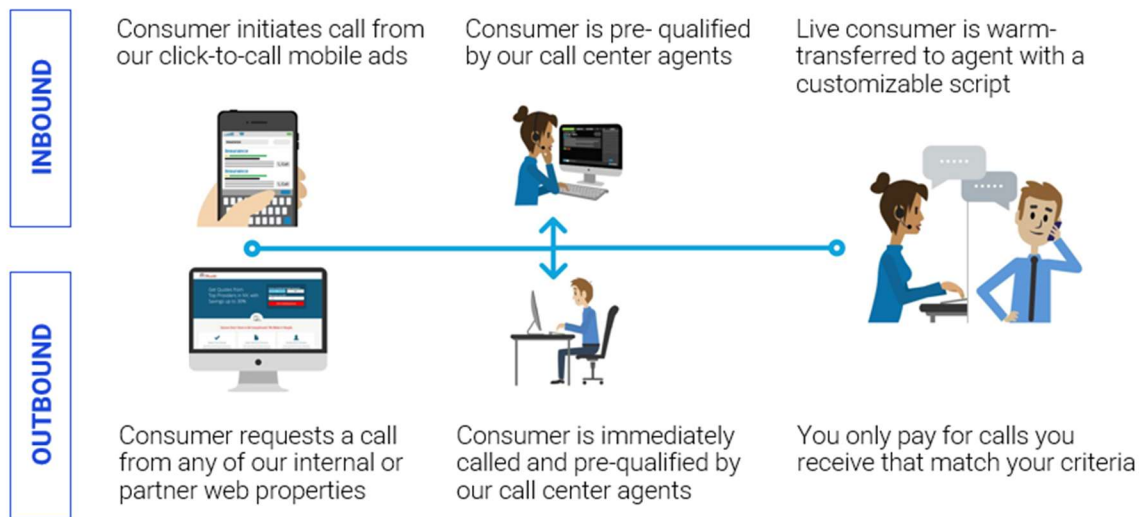
Client Stream

Live Call 2 Pager

Call Flow

Calls are either:

1. Consumer initiated by dialing a number on the website
2. Consumer initiated by submitting a form, and a call center agent outbounds them



The “outbound” scenario is the most common of the two scenarios. This means that when you receive the transferred call, they think you were a part of “initiating the call”.

This is the steps taken to get you connected with the consumer:

1. The consumer fills out a web based form or calls into the number on the website
2. The call center agent outbounds the consumer or answers the inbound call
3. Call Center Agent qualifies the consumer before transferring to you, the licensed agent
4. When the consumer is transferred you, it will always come from the same number
 - a. NOTE: You will receive an email with the consumer’s name, phone number, and any other details that were provided.
5. You will have about 20 seconds to answer the call
6. When you answer you will hear a prompt that says “You are receiving a lead from Lead Exchange. Press any digit to accept.”
 - a. You must press a digit to receive the call
7. A prompt will play advising the call is being recorded
8. You will then be connected with the call center agent.
9. The call center agent will then warm-transfer the consumer and introduce you as the licensed agent

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Missed Calls

It is very important to be available during your set times. When multiple calls are missed, the system will automatically remove you from the queue.

If the missed calls continue, it will negatively affect the volume of calls sent to you, which can ultimately lead to being removed from the system permanently.

If you need to change your hours to ensure you are available, please email the Support Box at ClientStream@intelemedia.com and allow 2 hours for us to make the schedule change.

Suggested Scripting

The below is a suggested opening and line of questioning to help progress or shift the consumer to review their coverage. You should be a counselor to the consumer and assist them with their coverage.

NOTE: Intelemedia is not a licensed insurance agency and cannot provide advice on TCPA or CMS compliance. Please modify the suggested scripts as needed to ensure that you are always compliant with TCPA and CMS requirements.

"Hi ___, my name is ___. We were connected today to review your Medicare options in order to make sure your plan is the right fit for you, or to see if there is something better. Before we move forward, I just want to confirm that you are in fact interested in reviewing your Medicare options. Is this correct?

If yes: Great, let me ask you a few questions to get started, and we can discuss your coverage. *Insert needed disclaimer.*

If no: Ok, no problem. Just so you know we are licensed in your state and work with (*insert carriers names*) and can assist you with making sure you are maximizing your coverage. Are you sure you wouldn't be interested in reviewing your coverage?

If yes: Great, let me ask you a few questions to get started, and we can discuss your coverage. *Insert needed disclaimer.*

If no, "Thank you for your time. Have a great day" then hang up.