Lead Advantage Pro®

The Next Evolution in Sales Management Tools

What is It?

Lead Advantage Pro is an all-in-one sales management tool designed by Senior Market Sales® (SMS). It was developed as a way to take prospects from lead to enrollment under one management-system umbrella.

What's the Purpose?

See more prospects, close more sales and save more time when you manage your leads, quoting and enrollments in Lead Advantage Pro.

Here's a breakdown of the
game-changing enhancements
that will streamline
your sales process.

Phone-Recording Solution

The Lead Advantage Pro/Phone.com integration is now live and represents one of the best ways to meet Centers for Medicare and Medicaid Services (CMS) call-recording regulations. This user-friendly solution is superior to many others because it allows you to receive and record calls on desktop, mobile phone or landline connections. Plus, you can use your contacts in Lead Advantage Pro for a quick click-and-call strategy.

You have the capability to run instant, multi-product quotes for Medicare Supplement, Medicare Advantage, Part D, final expense, term life and dental. No longer will you have to go out to multiple sites or request quotes from multiple sources.

Quoting

Forms

With Lead Advantage Pro, you gain access to a robust library of forms. These forms are maintained in the system and are always up-to-date. Using this feature helps ensure you are consistently using the current, compliant version.

A great feature of this system is its ability to import leads directly into Lead Advantage Pro for follow-up. Furthermore, you can manage them with customizable dispositions, an appointment calendar, notes and more. We all know good organization saves time, and nothing organizes the follow-up process like Lead Advantage Pro.

Leads

Enrollment

Seamlessly transition to online enrollments via carrier portal or our proprietary App by Email® and Agent-Initiated Consumer Online Enrollment (AICOE®) processes.

Now, there's a process approved by the Centers for Medicare and Medicaid Services (CMS) for completing SOA forms electronically. It takes mere minutes, putting you at a distinct advantage over other agents who do not have access to such time-saving options. Plus, all completed, signed and dated, SOA forms are saved in Lead Advantage Pro. These SOAs are available in PDF for the agent to provide to any Medicare plan sponsor in connection with enrollment.

Electronically Signed Scope of Appointment (SOA) Forms

Agent-Initiated Consumer Online Enrollment (AICOE®) and App by Email®

Here is an important feature. Lead Advantage Pro has a CMS-compliant online enrollment process that lets you sell both Medicare Advantage and Part D plans over the phone or Internet.

Locate healthcare providers by zip code, radius and/or provider type. In addition, organize data to compare plans with your client by preferred physician and/or in-network status.

Provider Look-up and Network Search (PLANS)

Blue Button

Import your clients' prescription information, pharmacies and associated providers. Quote and compare plans from top carriers. Pinpoint the right plan based on your clients' prescriptions and preferred providers.

Always offer the best PDP and MA plan options by being able to quote all plans available to a particular client based on area.

All-Carrier Part D (PDP) and Medicare Advantage (MA) Quoting

How do I Get Started?

This proprietary tool is available exclusively to SMS agents.
To request access, call an SMS marketing consultant at
1.800.786.5566, or **click here**.

Senior Market Sales

Senior Market Sales is a full-service insurance marketing organization (IMO) **dedicated to helping independent insurance agents** leverage time, make more money and put their business in a position of distinction.