

Follow Up Script

Hello, is this (Customer's First Name Example Clara)

Hello Clara, this is (Agent Name) with Compass Health. I helped you set up your Health Insurance during open enrollment.

The reason for my call – with all that going on, I wanted to check with you to see if you are satisfied with your insurance. Have you been going to your doctor for your check up?

Listen....

Oh, that is great to hear. I was really concerned about you guys, and I am really glad I was able to help. Did you have any questions about your coverage?

Listen....

(If they have any concerns, or questions, address the concern or question before moving on to the next stage)

I understand it is a tough time due to the pandemic and because of everything that is going on, it is a good time to review your Life Insurance.

I have noticed that Insurance companies have started to change the way they issue insurance in response to the current environment. For example, we used to be able to get people insurance up to the age of 85. But now, with some companies

we can only get insurance up to age 75. It is more important than ever to make sure you are satisfied with what you have because we don't know what changes we are going to see in the future in response to COVID or other public health issues.

Do you have life insurance in place?

Is it the old or the new kind?

Are you satisfied with your current amount of insurance?

You have several options available. I would be happy to review them with you. I have several openings in my calendar on Wednesday will you be available?