T65 Outbound Call Framework

PROFESSIONAL MEDICARE TRAINING SAMPLE

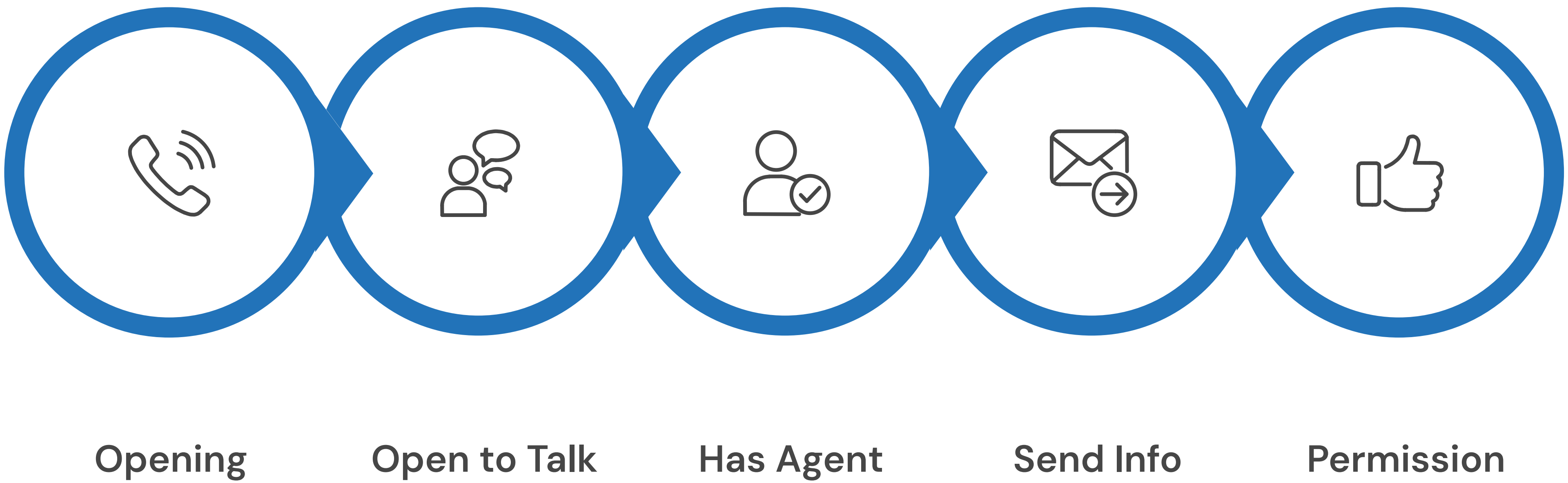
Outbound Medicare conversations can feel difficult for new agents because they are unsure how to start the call without sounding overly sales-focused.

This framework provides a simple structure that helps agents introduce themselves professionally, explain the reason for the call, and guide the conversation toward an educational Medicare discussion.

The goal is to create a calm and professional conversation rather than a sales pitch.

Framework Overview

This outbound call framework is organized into six key sections, each designed to help agents navigate a Medicare conversation with confidence and professionalism.



Each section addresses a specific moment in the conversation — from the initial introduction all the way through scheduling a follow-up. Together, they create a calm, structured, and educational experience for the prospective Medicare beneficiary.

Section 1 – Opening the Call

PURPOSE

Introduce yourself clearly and explain the reason for the call.

> **Script Example**
>
> Hello, this is _____.
>
> I work with individuals approaching Medicare eligibility and help explain how Medicare works as they get closer to turning 65.
>
> I'm reaching out because many people have questions about the Medicare enrollment timeline and how coverage options are structured.
>
> I wanted to see if you had started looking into Medicare yet.

Training Note: Keep the introduction simple and professional. Focus on education rather than selling.

Section 2 – If They Are Open to Talking

PURPOSE

Transition into a short Medicare conversation.

Conversation Structure

1. Confirm their birthday month
2. Ask if they have enrolled in Medicare
3. Ask if they are currently working or covered by an employer plan

Example Question

Have you already enrolled in Medicare Part A and Part B, or are you still exploring your options?

Handling Common Responses

Agents will frequently encounter two common responses during outbound calls. Here is how to handle each one professionally and keep the conversation moving forward.

"I Already Have an Agent"

That's great. Many people like to gather information early so they understand how Medicare works before making final decisions.

If it's helpful, I'm always happy to explain how the coverage structures work so you have a clear understanding of your options.

"Just Send Information"

Absolutely. I can send some general information explaining how Medicare coverage is structured.

Before I do that, would you mind if I ask one quick question so I send the most relevant information?

Section 5 – Permission to Continue

EXAMPLE SCRIPT

> If it's okay with you, I can ask a few quick questions to better understand your situation and then explain how Medicare coverage pathways are typically structured.

This script is designed to be low-pressure and respectful of the prospect's time. By asking permission before continuing, agents demonstrate professionalism and build trust naturally during the conversation.

Section 6 – Scheduling a Future Conversation

EXAMPLE SCRIPT

> Many people prefer to schedule a short conversation closer to their Medicare eligibility date so they can review everything clearly.
>
> Would you like to schedule a quick time to go over that?

Schedule Near Eligibility Date

Timing the follow-up conversation closer to the prospect's Medicare eligibility date ensures the information is timely and relevant.

Review Everything Clearly

A scheduled conversation gives both the agent and the prospect dedicated time to go over coverage pathways without feeling rushed.

Low-Pressure Approach

Framing the appointment as a review rather than a sales call keeps the tone educational and professional.

Why Structured Outbound Conversations Matter

Having a clear outbound call structure helps agents achieve better outcomes in every conversation.

Start Conversations Confidently

A defined opening removes uncertainty and helps agents begin every call with a clear, professional introduction.

Avoid Sounding Overly Sales-Focused

The framework keeps the tone educational, reducing the risk of the prospect feeling pressured or disengaged.

Guide the Conversation Naturally

Each section flows logically into the next, making it easy for agents to steer the discussion without forcing it.

Identify Individuals Who Want More Information

Structured questions help agents quickly determine who is ready to learn more and who needs a follow-up at a later date.

Inside the Full Training System

Inside the full training system, agents receive additional resources to build their outbound skills and confidence.

1

Additional Outbound Scripts

Expanded scripts for a variety of outbound scenarios and prospect types.

2

Objection Frameworks

Structured responses to the most common objections agents encounter on outbound calls.

3

Appointment-Setting Guides

Step-by-step guidance for converting conversations into scheduled appointments.

4

Conversation Practice Drills

Hands-on practice exercises to help agents internalize the framework and build real-world confidence.

CMS Disclaimer

Important: Please read the following disclaimer carefully before using this material in any agent communication or training context.

This material is provided for training and educational purposes only and is intended to demonstrate structured conversation frameworks for insurance agents.

This guide does not provide legal advice, tax advice, or official Medicare guidance. It does not recommend any specific Medicare plan, carrier, or coverage option.

> Agents must follow all Centers for Medicare & Medicaid Services (CMS) regulations, carrier guidelines, state insurance rules, and the policies of their agency or compliance department when communicating with Medicare beneficiaries.