

T65 INBOUND SCRIPT SAMPLE GUIDE

PREVIEW EDITION

T65 Inbound Script Framework
Professional Medicare Training Sample

Overview

This is a structured inbound Turning 65 call model designed to help agents sound calm, organized, and professional. The goal is not to memorize lines, but to follow a repeatable flow that builds trust and reduces mistakes.

This sample shows the structure used inside the full training system.

Section 1 – Opening Control

Purpose

Establish authority. Control the tone. Set expectations. Confirm intent.

Why This Matters

Most new agents start calls reactively. Professionals start calls intentionally.

Script Example

Thank you for calling. My name is _____.

I specialize in helping individuals approaching Medicare eligibility understand how Medicare works and how different coverage pathways are structured.

Before we begin, today's conversation is educational. I will explain Medicare at a high level and ask a few structured questions, so I understand your situation. Specific plan options depend on your ZIP code, eligibility, and carrier guidelines.

Are you calling because you are turning 65 soon?

Birthday Month: _____

What prompted you to reach out today?

Training Note

The goal here is calm authority. No pressure. No selling. Just structure.

Section 2 – Enrollment Status Review

Purpose

Confirm timeline before discussing options.

Script Framework

Your Initial Enrollment Period is a seven-month window that begins three months before your birth month and ends three months after.

Have you already enrolled in Medicare Part A and Part B?

Receiving Social Security

Yes

No

Part A Enrolled

Yes

No

Part B Enrolled

Yes

No

Effective Dates

Training Note

Never rush past enrollment timing. Many compliance and coordination issues begin here.

Inside the full training library, we break down:

- Initial Enrollment Period
 - Special Enrollment Period
 - Employer coordination scenarios
 - Common timing mistakes agents make
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Section 3 – Current Coverage Discovery

Purpose

Understand what pays first before discussing plans.

Currently Working

- Yes
- No

Coverage Type

- Employer
- Spouse Employer
- Retiree
- COBRA
- VA
- Medicaid

Employer Size

- Under 20
- 20 or More
- Unsure

Notes

Training Note

Employer size can change how coverage coordinates. Always document clearly and confirm with employer and upline guidance.

Section 4 – Health and Lifestyle

Primary Doctor

Specialists

Travel Frequently

Yes

No

Prescription Medication Count

Preferred Pharmacy

Why This Matters

You are not collecting this to sell. You are collecting this to structure the education discussion.

Section 5 – Financial Preference Framing

Script

People generally prefer one of two cost structures.

Some prefer more predictable monthly costs.

Others prefer lower monthly premiums and paying as services are used.

Which feels more comfortable for you?

Response Notes

Training Note

This question positions both coverage pathways without bias.

Section 6 – Coverage Pathway Education

Path One – Original Medicare

- Part A and Part B structure
- Optional Part D
- Supplemental coverage concept
- No built in annual out of pocket maximum unless additional coverage is added

Path Two – Medicare Advantage

- Bundled Part A and Part B
- Often includes Part D
- Network structure
- Annual maximum out of pocket

Professional Standard

Present both neutrally. Allow the client to evaluate structure.

Section 7 – Permission Transition

Based on what you shared, would you like to review how plans in your ZIP code are structured so you can compare these pathways side by side?

This sample shows only the core structure.

Inside the full membership system, you receive:

- Complete objection modules
- Employer coordination scripts
- Enrollment confirmation scripts
- Follow up systems
- Documentation checklists
- Practice drills

If you want structured call frameworks instead of guessing during conversations, the full training library is available inside the membership platform.

For learning purposes only. This material provides educational training support and structured conversation examples for insurance agents.

This platform is not a certification program and does not provide compliance, legal, or regulatory instruction. No plan recommendations or carrier endorsements are provided.

Agents must follow all applicable CMS guidelines, carrier requirements, state regulations, and guidance from their upline or compliance department.