

## MEDICARE TRANSFER SCORE CARD

SECTION	DESCRIPTION	PARTS	POINTS	SCORE	RATIONALE
I	INTRODUCTION	Recorded Line	5/Autofail	5	Recorded line must be stated on all calls or the call will be null and void. This is a Federal regulation on all telecommunication companies
		Company and Self Introduction	5/Autofail	5	Agent must state where we are calling from and introduce self
II	PURPOSE OF THE CALL		10/Autofail	10	Agent must clarify the nature and purpose of the call on the onset of the call
III	VERIFICATION				
		Full Name	2	2	Ensure we are speaking with the correct person
		Phone Number	2	2	Ensure we have the correct number. Upon transfer, it is important for our partners to have the ability to call the lead back
		State	5/Autofail	5	Correct State must be verified to establish that the lead resides in the correct service area
		Zip code	5/Autofail	5	Correct area code must be verified to establish that the lead resides in the correct service area
IV	Qualifying Questions				
		Age	5/Autofail	5	Lead must be qualified based off Age
		Parts A & B	5/Autofail	5	Lead must have an active A/B or enrolling into Part B in the next 30 days to be deemed qualified
		MA or MS	10/Autofail	10	Agent must establish whether the lead has MA or MS Plan, so we can send to the correct client
		Scope of Appointment	5/NA/Autofail	5	Depending on the lead's situation, grant 5 points if Not Applicable
		Medicaid	5/NA/Autofail	5	Agent must establish whether the lead has Medicaid or not , so we can send to the correct client, grant 5 points if Not Applicable
		Scope of Appointment	5/NA/Autofail	5	Depending on the lead's situation, grant 5 points if Not Applicable

		Interest in MS	5/NA/Autofail	5	Agent must establish whether the lead is interested in MS or not , so we can send to the correct client. Grant 5 points if Not Applicable
		Scope of Appointment	5/NA/Autofail	5	Depending on the lead's situation, grant 5 points if Not Applicable
V	BUILDING VALUE		5/NA	5	Remind the lead "What's in it for me?", this will help increase billable conversion, grant 5 points if Not Applicable
VI	SETTING EXPECTATIONS		5	5	Remind the lead "What's in it for me?", this will help increase billable conversion
VII	HAND-OFF SCRIPT		5	5	Agent must introduce self to the llicensed agent and provide lead's information
	Courtesy Close		2	2	Always end the call properly
	Professionalism		2/AF	2	Agent must remain professional at all times and refrain from discussing personal beliefs, opinions, and social conversations
	Communication Skills		2	2	Pacing, Clarity, Voice Inflection
				100	