



## FREE & DISCOUNTED LIVE-CALL TRANSFER MEDICARE LEADS ATTESTATION

July 1, 2023

Agents participating in the “STEP UP TO SUCCESS” / **Gemstone** program must agree to the following requirements:

- Have a minimum of **03** Medicare carrier contracts under Owen Insurance Group (OIG) with at least 02 being MAPD (UHC – Humana – Aetna – Cigna – WellCare – Devoted).
- Must complete a min. 2-3 hour training program and agree to any future training that may be required.
- ‘Role play’ type calls may occur to determine your suitability for Live-Call transfers. Not everyone is suited for phone sales; therefore, some may not be a candidate for this Live-Call transfer program.
- Must always approach ALL calls as ‘Consultative’ and **not** a ‘sales’ call – build trust and rapport.
- Must update disposition of ALL leads in CRM – Lead Advantage Pro.
- Must commit to a minimum of 10 hours per week to receive calls (*may be flexible*).
- Must answer ALL Live-Call Transfers or risk being removed from the program – 03 missed calls or more is unacceptable, and those leads are LOST. You may be dropped from the program.
- Prior to starting the program, we require the following for the Agent Lead Data Sheet:
  - Name, phone number(s), email address, and physical address
  - RTS Carriers appointed under OIG hierarchy
  - Geographical areas (cities & states) you want to receive calls from
  - Days and times available to receive calls (be properly prepared)
- You must comply with and read all required Medicare disclaimers on every call.
- Note: Live-Call Transfer leads are generated through Facebook, Google, and affiliate landing pages.
- You can only receive Live-Call Transfer leads M-F between 9:00 am – 6:00 pm EST.
- You may purchase additional Live-Call Transfer leads at a discount based on your Club Level status.

AGENT NAME: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_