



2025

Master The Game Of Medicare

Pre-Appointment Needs

- 48 Hour SOA
 - If walk/call-in, SOA at the time of appointment
- Client Information
 - Zip Code/County
 - Providers
 - Prescriptions
 - Medicaid Eligible: Yes or No
 - Current Coverage
 - Don't know how to find? [Medicare.gov](https://www.medicare.gov) or Sunfire (MedicareLink)

Appointment Preparation

- What plans are available?
 - Which plans can YOU sell?
- Research Plans
 - [Medicare.gov](https://www.medicare.gov)
 - MedicareApp or MedicareLink
- Confidence in your quoting/enrolling system
- Determine the top 3-5 options
 - Cheapest
 - Best Networks
 - Most Extras

Packing List

- Cross-Sell Sheet
- Fact-Finder (if you use one)
- Plan Booklets
- Presentation Material
 - You can use the plan books
 - Side-by-Side Spreadsheet
 - Flipbook
- Computer or Tablet
 - Internet source
- Travel monitor
- Remember Me Items
 - Business Cards
 - Pens
 - Magnets, etc.

Key Stages of the Appointment

1. Warm up - Rapport Building (5 min)
2. Needs Assessment (10 min)
3. Plan Presentation/Discussion/Decision (30 min)
4. Enrollment (10 min)

Warm Up & Rapport Building

- Keep it simple
- Be intentional and take notes
 - Client retention begins at warm-up
- Introduce yourself
 - Who are you, what do you do?
 - Establish goals of the meeting.

Needs Assessment

- Confirm Medicare status (ideally you've already done this)
- Identify hierarchy of importance, i.e: How do they shop?
- Discovery
 - Doctors, Prescriptions, Pharmacies,
 - Healthcare goals, concerns, budget
- You'll be operating your quoting platform during this phase
 - [Medicare.gov](https://www.medicare.gov) (create account)
 - Integrity: MedicareLink, MedicareApp, MedicareCenter

Plan Presentation

- Education Phase
- Medicare 101
- Presentation of Options
 - Medicare Advantage
 - Medicare Supplement + PDP
 - Which one sounds most like what you're looking for?
- Save that one for last

Plan Presentation cont'd.

- You already have drugs and drug costs, you'll need that with both options
- Medicare Supplement + PDP
 - Quote: CSG APP
 - Quote: [Medicare.gov](https://www.medicare.gov), Integrity
- Medicare Advantage Plan
 - Quote: [Medicare.gov](https://www.medicare.gov), Integrity

Questions and Objections

- Encourage questions
- Acknowledge concerns
- Educate vs. sell
- YOU ARE THE EXPERT!

Enrollment

- [Integrity.com](https://www.integrity.com)
 - MedicareApp
 - MedicareLink
 - MedicareCenter (contacts)
- Carrier Sites
- Paper Apps
- [Medicare.gov](https://www.Medicare.gov) (if you don't like commissions)