Sample Follow-up Call Script

Suggest Calling 30 days after Enrollment or 10-14 days after Thank You Letter

“Hi *(Client Name)*, it’s (*your name)*. How are you doing?

I just called to touch base and see how things are going with your Medicare Advantage plan.

Did you get the Welcome Kit? Was your ID card correct? Great! Did everything go okay at the pharmacy? Super!

Do you have any questions about the plan? No, great well let me know if anything comes up.

You have my contact information, right? Okay, well let me know if you need any help.

Thanks again, have a great day.”