

PlanEnroll Lead Campaign Success Guide

Build your book of business with exclusive leads!

Ready to grow your book of business this AEP? PlanEnroll runs national and local AEP campaigns to bring exclusive leads to Plan Enroll Network Agents. Use these tips to help you leverage the power of PlanEnroll leads!

Get Access to Exclusive Leads

To unlock access to these exclusive PlanEnroll AEP leads, complete a short training to become a PlanEnroll Network Agent. You only have to complete the training once, and it takes just a few minutes:

- Go to **Trainings.PlanEnroll.com** to complete the short training videos

TIPS FOR SUCCESS

- **Campaign Geography** — Set up your campaign to reach a broad geographic area, including anywhere you can sell remotely, to capture as many leads as possible. Go as big as you're comfortable selling in!
- **Be Available** — Make sure you toggle in on **IntegrityCONNECT Leads** when you're available to work leads! Just click the "I'm Available" toggle to start receiving leads.
- **Call Types** — When receiving Realtime calls, there are two ways that lead calls come to you:
 - » **Warm Transfers** are calls that are prescreened then transferred to you. These consumers have expressed interest in a Medicare plan and are connected to you for help finding plan options that meet their needs.
 - » **Direct Connections** are calls that come to you directly from consumers. These consumers have not been prescreened and may have questions about Medicare plans and their options. These consumers are reaching out for help and it's a great opportunity to build relationships.
- **Identify Yourself** — Make sure to introduce yourself as a **PlanEnroll Network Agent** when you answer the phone, or make contact with the consumer, so they know who you are.

Get your high-quality, exclusive AEP leads today with IntegrityCONNECT Leads!