DAY 1 – 11:00 AM TRAINING: DAY 1 LEAD SCRIPT WALKTHROUGH & PRACTICE

Time Block: 11:00 AM – 12:00 PM
Purpose: Help agents understand the full Day 1 lead call flow, develop a calm and confident tone, and practice permission-based discovery without sounding scripted or pushy.

TRAINING OVERVIEW

This session is focused on **understanding the structure and intent** of the Day 1 lead script — not memorizing lines.

Agents should leave this training knowing: - Why each section of the script exists - How to control pacing and tone - How to sound natural while staying compliant - How to guide the conversation instead of interrogating the client

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WHAT THE DAY 1 SCRIPT IS DESIGNED TO DO

The Day 1 lead script has three primary goals:

1. **Create safety and trust quickly**
   Clients should feel respected, not sold.

2. **Identify why the client is looking for coverage**
   This determines urgency, plan type, and next steps.

3. **Set up a screen-share–led comparison**
   The script is meant to lead into transparency, not a pitch.

SCRIPT FLOW (HIGH LEVEL)

Agents should understand the script in this order:

1. Introduction & permission-based opening
2. Role-setting (who you are and how you help)
3. Self vs. family clarification
4. Reason for looking (trigger event)
5. Timing and effective date

6. Transition to visual plan review

Each section builds on the last — skipping steps causes resistance later in the call.

TONE & PACING STANDARDS

Tone Guidelines: - Calm, conversational, and confident - Never rushed - Never overly excited or salesy

Pacing Guidelines: - Pause after questions - Let clients finish speaking - Slow down when discussing personal or financial topics

Clients should feel like they are being guided — not interviewed.

PERMISSION-BASED QUESTIONS

Permission-based questions reduce defensiveness and increase honesty.

Examples of proper framing: - “Is now a good time to chat for a few minutes?” - “Would it be okay if I asked a couple quick questions to point you in the right direction?” - “Before we look at plans, can I understand what’s most important to you?”

Agents should **never assume consent** — always ask.

DISCOVERY: WHAT YOU ARE LISTENING FOR

During discovery, agents should listen for: - Urgency (lost coverage vs shopping) - Budget sensitivity - Doctor or network needs - Past frustrations with insurance

The goal is understanding — not correcting or educating yet.

PRACTICE EXPECTATIONS

Agents should practice: - Opening the call naturally - Explaining their role without over-talking - Asking discovery questions and listening fully - Keeping control of the call while remaining relaxed

Mistakes are expected during practice — this is where confidence is built.

KEY REMINDER

> **You do not need to sound perfect — you need to sound human, confident, and in control.**

The script is a framework, not a word-for-word requirement.

END OF MODULE OBJECTIVE

By the end of this session, agents should be able to: - Walk through the Day 1 script confidently - Explain why each section exists - Begin practicing calls without sounding robotic

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