KAISER PERMANENTE VALUE AND HEALTH INSURANCE 101 CHAPTER 3 – Getting to know your prospect

FINAL "As Shot" SCRIPT WITH VISUALS

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Est. TRT: 2:40

Date: December 17, 2015

	GRAPHICS	AUDIO
	Title Graphic: Getting to know your prospect	Presenter Ron
1.	On-Camera w/lower third Text: Get to know their: Business, vision, needs On-camera	Hi, I'm Ron Illenberger, an In-House Sales Executive at Kaiser Permanente. I'm here today to help set you up for success by ensuring you manage your prospect meeting with professionalism and purpose. Your success will depend on getting to know your Decision Maker's business, their vision, and ultimately, their needs. And we're here to help you achieve that.

Getting to Know Your Prospect

Job #15-0577 "As Shot" FINAL

2.	Animate list of questions: Do you currently offer group health benefits to your employees? Are you covered through a trust or professional employer organization (PEO)?	The key is to steer the conversation in the right direction by asking the right questions. We've made that simple, by providing you with pre-qualifying questions that are industry standard.
	Are you breaking away from a current/active large or small group?	
	How many hours a week will your eligible employees have to work to qualify for coverage?	
	What portion of the employee premium are you planning to contribute?	This questionnaire will help you to:
	Icons of two people meeting Float text: Determine client eligibility Identify client needs Offer best health care solution	manage this critical meeting, determine if your client is eligible for small group coverage, and lastly, help you identify their needs so you can offer them the best possible health care solution.

3.	Broker home page:	The questionnaire is located on our Broker Site.
		You'll find it listed as step 1 on the "Apply for Coverage" page.
	Take this questionnaire with you Prepare to meet with your prospect by <u>printing out this list of</u> <u>questions (PDF)</u> . Record the answers in the space provided so you can review them later with your Kaiser Permanente sales executive.	You'll want to print it out and have it with you so you're prepared.
	 Q: Do you currently offer group health benefits to your employees? If the answer is yes, ask who their current carrier is and their renewal date? If it's Kaiser Permanente, please stop and ask the following questions: 	After each question, you'll find directions on where to go and what to do based on their answers.
4.	On-camera	Asking these 9 initial questions helps avoid the pitfalls of providing a quote to an unqualified group or offering them unaffordable coverage.

Getting to Know Your Prospect Job # 15-0577 "As Shot" FINAL

On-camera

5.

Float over Census Form

For a rate quote, complete the attached Excel file.	information below and	email to kaise	er.sbu.sales	9kp.org.	You may als	o email the lis	it of com	npany employees in ar
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Once you've completed the questionnaire, your goal is to get group and employee information through our census form. We'll use this to provide a customized Kaiser Permanente quote.

The census form can also be found on our site. The meeting will be a true success if your prospect is willing to complete this form and provide you the opportunity to quote.

If they don't have time during the prospect meeting, you can leave it behind or email it. Make sure they understand it'll take 24-48 hours from the time you receive it to get them a quote. Then you'll set a follow-up meeting to review the proposal and discuss the options that best suit their needs.

In order for our team to provide you a complete and accurate quote, we'll need all fields filled out.

Shot" FINAL

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6.	On-camera Reprise Questionnaire & Census form Text: Identify a sales strategy Increase chance of a winning sale	Our Sales Team is here to help you understand how to take the information captured on both forms and create a strong solution. We can also help identify a sales strategy so that when you present the proposal to your prospect you'll increase your chance of winning the sale.
7.	On-camera TEXT: Recap: 1.) Questionnaire Determine eligibility Help understand client needs 2.) Census Form Collect specific information to generate quote Text: Get to know your prospect Make an informed decision	So to recap, step 1 is the questionnaire - that will determine eligibility and help you understand what your client is looking for. Step 2 is the census form to collect specific information used to generate a quote. Remember, the goal is for you to get to know your prospect through these forms and help them make an informed decision.
8.	On-camera 1-800-789-4661 option 4 Account.kp.org Then go to: "New Group Submission Guidelines" within the "Apply for Coverage" area	If at any point you need additional support, we're here for you. Feel free to call your Kaiser Permanente Small Group Sales Executive. If you haven't engaged with your dedicated executive, call us and we'll be happy to connect you to your sales partner. Thanks for watching.
9.	© 2015 Kaiser Permanente. All rights reserved.	