

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

FINAL “As Shot” SCRIPT WITH VISUALS

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	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.

<p>2.</p>	<p>Animate list of questions: Do you currently offer group health benefits to your employees?</p> <p>Are you covered through a trust or professional employer organization (PEO)?</p> <p>Are you breaking away from a current/active large or small group?</p> <p>How many hours a week will your eligible employees have to work to qualify for coverage?</p> <p>What portion of the employee premium are you planning to contribute?</p> <p>Icons of two people meeting Float text: Determine client eligibility Identify client needs Offer best health care solution</p>	<p>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.</p> <p>This questionnaire will help you to: 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.</p>
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3. Broker home page:



Highlight:
“Apply for Coverage” page



Take this questionnaire with you

Prepare to meet with your prospect by [printing out this list of questions \(PDF\)](#). Record the answers in the space provided so you can review them later with your Kaiser Permanente sales executive.

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:

The questionnaire is located on our Broker Site.

You'll find it listed as step 1 on the “Apply for Coverage” page.

You'll want to print it out and have it with you so you're prepared.

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.

5.

On-camera

Float over Census Form

KAISER PERMANENTE Small Business CENSUS

INSTRUCTIONS
For a rate quote, complete the information below and email to kaiser.sbu.sales@kp.org. You may also email the list of company employees in an attached Excel file.

COMPANY INFORMATION

Company name _____ Effective date (mm/dd/yyyy) ____/____/____
 Street address (no P.O. boxes) _____
 City _____ State _____ ZIP _____ County _____
 Office phone (____) _____ Ext. _____ Fax (____) _____ Email _____
 Current carrier _____ Tax I.D. # _____
 Number of employees on payroll with withholdings: _____

BROKER INFORMATION

Agent name _____ Kaiser Permanente firm ID _____
 Office phone (____) _____ Ext. _____ Fax (____) _____ Cell phone (____) _____ Email _____
 Firm name _____ License # _____
 Street address _____ City _____ State _____ ZIP _____

EMPLOYEE/DEPENDENT ELIGIBILITY INFORMATION*
 Please list all employees who are eligible for health care benefits, including dependents who will also be covered. Please use additional pages for additional employees.

First name	Last name	Date of birth (mm/dd/yyyy)	Age	Home ZIP	County	Subscriber (S) or Dependent (D)

*All fields must be filled out completely to process this form.

CONTACT INFORMATION
 Email: kaiser.sbu.sales@kp.org For more information, please contact Kaiser Permanente Small Business Broker Sales Unit at 800-789-4661, option 4.

Small Business 6079314_V3 July 2014 Broker

KAISER PERMANENTE | Broker [Setting plans](#) Your clients Working with KP Resource

California [View another region](#)

small business **Apply for coverage** Covered ZIP codes

You're an important partner, and we're here to support you as you grow your business and increase your revenue in this exciting market. If you're new to selling Kaiser Permanente small business plans, we can help you ask the right questions to efficiently qualify, quote, and enroll new groups. Follow the steps below to help your clients find the coverage that's right for them.

- Employees enrollment (English) (PDF)
- 2014 New Group Application FOR JANUARY GROUPS (PDF)
- 2013 New Group Application (PDF)
- Understanding Guidelines for Brokers and Providers (PDF)
- Competition
- Recertification information (PDF)
- Policy Guidelines
- Apply for coverage

New Group Minimum Submission Guidelines
 Healthcare reform continues, and in anticipation of a big Q4 2015, please read these New Group Minimum Submission Guidelines to save time and ensure efficient processing starting with 10/1/2015 effective date submissions.

Dental plans and rates
 Renewal information
 Disclosure forms
 Exchanges

Step 2: Quote your group [Close](#)

If your group answered yes to the questions above and prompted to move forward, based on the responses it appears to qualify for coverage.

You can also get a small business quote by emailing a completed [census form \(PDF\)](#) and [excel template](#) to our broker sales team at kaiser.sbu.sales@kp.org. The form should include subscribers' ZIP codes and ages, as well as the ages of their spouses and dependents.

Call your Kaiser Permanente sales executive to review your proposal and get help preparing to present the solution and quote to your prospect. If you have not received a call or email from your sales executive call **800-789-4661, option 4** so they can introduce you.

Highlight each section of census form

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.

6.	<p>On-camera Reprise Questionnaire & Census form</p> <p>Text: Identify a sales strategy Increase chance of a winning sale</p>	<p>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.</p>
7.	<p>On-camera TEXT: Recap:</p> <ul style="list-style-type: none"> 1.) Questionnaire Determine eligibility Help understand client needs 2.) Census Form Collect specific information to generate quote <p>Text: Get to know your prospect Make an informed decision</p>	<p>So to recap, step 1 is the questionnaire - that will determine eligibility and help you understand what your client is looking for.</p> <p>Step 2 is the census form to collect specific information used to generate a quote.</p> <p>Remember, the goal is for you to get to know your prospect through these forms and help them make an informed decision.</p>
8.	<p>On-camera</p> <p>1-800-789-4661 option 4 Account.kp.org Then go to: "New Group Submission Guidelines" within the "Apply for Coverage" area</p>	<p>If at any point you need additional support, we're here for you. Feel free to call your Kaiser Permanente Small Group Sales Executive.</p> <p>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.</p>
9.	<p><u>© 2015 Kaiser Permanente. All rights reserved.</u></p>	