

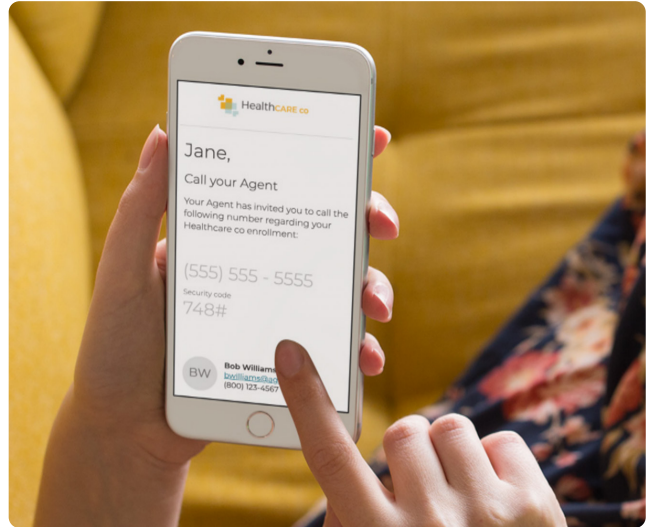
Agent Call Recording for Field Agents

Use Agent Call Recording to record the **Shopping experience, Plan comparisons, Scope of Appointments AND Enrollments.**

Agent Call Recording is turn-key and easy-to-use.

Agents can initiate a recorded call to the member's phone through PlanCompare ONE and Medicare Edge. Alternatively, for enrollment-only appointments, an agent can send the beneficiary an email or text invite to call the agent to complete the enrollment.

Once connected, agents can proceed as they normally would with their customer. Once the call is finished, the recording is available in the member profile for ADMIN users to access and review.



Here is the seamless process for recording calls:

1

Agent calls beneficiary via platform and beneficiary accepts the call.

2

Call recording information is clearly displayed in the sidebar on the right-hand side of the screen on the platform.

3

Agent takes beneficiary through Scope of Appointment, Shopping and Enrollment. Recordings are linked with beneficiary profile for ADMIN to retrieve and review.

Reach out today to schedule a demo.