

Instant Meetings

How It Works

1 AGENT SETUP

- Completes Onboarding
- Requests to receive Instant meetings
- Agent gets added to Instant Meetings
- Pays for meeting

2 GOING LIVE

Agent must have Instant Meetings toggled to “enabled” in the dashboard under settings

- Agent is Active?
- Any free blocks > 45 minutes?

*There is no guarantee number of instant meetings you will receive during your available time slot

3 CONSUMER ON PHONE

- Rep qualifies consumer
- Confirms Zip
- Agent receives automated voice message offering the call
- Agent must press “1” to accept call
- First agent to accept is connected with the consumer
- Agent also receives text message with consumer name and phone number

4 POST CALL

- Licensed agent communicates on ALL Instant Meetings received via notes and dispositions
- Scope will be stored and available for review in the Portal

5 QUALITY INSTANT MEETING: Billable

- Successful transfer to the agent

6 CURRENT PRICING

- Each Instant Meeting will cost \$39
- Credits can be purchased at any time under “Agent Funds” and selecting “Continue Purchasing Funds”

Questions?

support@medicareexpress.com