



Agent Boost Rocket CRM

Agent Boost Marketing strives to not only meet agent needs and expectations, but to exceed them. We are always exploring new and innovative ways to provide additional value as your FMO. As such, we are excited to introduce you to our new lead management CRM “Rocket CRM”. This customer relationship management (CRM) will automate many touches through the lead prospecting cycle and increase efficiency. Some of the touches include text messaging, automated voicemails, emails and more. It’s a robust platform with flexibility. It can be used with managing your existing clientele as well as prospective new business. It’s provided to you at absolutely no cost! We are incurring the full cost of this CRM for all our agents nationwide.

User Understanding

It is important that you understand while this system is powerful and can enhance your business, it also needs to be used properly in order to maintain compliance. This system can “automate” campaigns and actions, but it’s vital that the lead or prospect has agreed or opted into that type of action. Beyond CMS compliance, it’s especially important to follow TCPA (Telephone Consumer Protection Act) compliance when using this platform. If agents do not utilize the system properly, they may be subject to non-compliance and potential legal action. Agent Boost Marketing has a lead program available for agent purchase in conjunction with this platform that are compliant and who have opted in. Any lead uploaded into your CRM with automations created should have the agreed to the following disclaimer language prior:

“I provide my signature giving express consent to receive marketing communications via automated telephone dialing systems, artificial or pre-recorded voices, emails, live phone calls, pre-recorded calls, postal mail, text messages via SMS or MMS, and other forms of communication regarding offers of Medicare Supplement, Medicare Advantage, Part D, or other products from <agent or agency> and/or one or more of it’s marketing partners and affiliates and agents to the number(s) and/or email I provided including a mobile phone, even if I am on a state or federal Do Not Call and /or Do Not Email registry. The list of companies participating is subject to change. I understand my wireless carrier may impose charges for calls or texts. I understand that my consent to receive communications is not a condition of purchase and I may revoke my consent anytime”.

Terms and Conditions

Please read and agree to the below terms and conditions prior to use:

By signing below, I agree to indemnify, defend and hold harmless Integrity Insurance Services Inc dba Agent Boost Marketing from and against any and all claims, liabilities, judgements, costs, damages and expenses (including reasonable attorneys’ fees) arising out of the use and/or misuse of this CRM.

Agent Name

Signature

Date

