

SMS Technology Platform Comparison

	Lead Advantage Pro	Medicare Insurance Direct: Broker	Medicare Insurance Direct: Consumer	CSG	Advantage Telesales
Quoting/Tools					
Quote All Prescription Drug Plans (PDP)	Yes	Yes	No	Yes	Yes
Quote All Medicare Advantage Plans (MA)	No	Yes	No	Yes	Yes
Quote Medicare Supplement*	Yes	Yes	Yes	Yes	Yes
Compare Plans Side by Side	No	Yes	Yes	No	Yes
Quoting for Dental, Final Expense & Life	Yes	No	No	Yes	No
Quoting for Hospital Indemnity	No	No	No	Yes	No
Blue Button Integration	Yes	Yes	No	No	Yes
RX Import	Yes	No	No	No	No
Provider Lookup	Yes	No	No	No	No
Special Needs Plans (SNP) Quoting Filter	Yes	No	No	Yes	No
Enrollment Tools					
Email Medicare Advantage/Prescription Drug Plan (MA/PDP) Enrollment Links	Yes	Yes	No	No	Yes
Text Medicare Advantage/Prescription Drug Plan (MA/PDP) Enrollment Links	No	Yes	No	No	Yes
Dual Special Needs Plan (DSNP) Enrollment Capabilities**	Yes	Yes	No	No	Yes
Face to Face Enrollment	Yes	Yes	No	No	No
Consumer Self-Enrollment	No	No	Yes	No	No
Single Sign-On Options for Carrier e-Apps	Yes	No	No	No	No
Universal Medicare Supplement e-Apps**	No	No	No	Yes	No
Telephonic/Call Center Enrollment	No	No	No	No	Yes
Pre-Populated PDFs	Yes	No	No	No	No
Scope of Appointment (SOA)					
Electronic SOA	Yes	Yes	No	Yes	Yes
Text SOA	No	Yes	No	No	Yes
Customer Relationship/Lead Management					
CRM capabilities***	Yes	Yes	No	No	Yes
Agency Support to Manage Multiple Users	Yes	No	No	No	No
Ability to Co-Brand with Agency Logo	Yes	No	No	No	No
Lead Importing/Management	Yes	No	No	No	No

*LA Pro quotes all SMS carriers, MID is limited, and CSG quotes all carriers

**Limited to select carriers

***MID is limited to creating/searching profiles, making notes/tasks