

Live-Transfer Lead Script

Below we have outlined the telemarketing script our callers use to qualify potential borrowers. With every homeowner's application we gather, their information is screened against your requested criteria before we can transfer their call directly into your office.

INTRODUCTION:

CALL-AGENT: "Hello may I speak with Gary Schulmeyer?"

BORROWER: "Yes, speaking."

CALL-AGENT: "Hi, this is Kim, I'm an assistant with The Mortgage Saver Network. How are you doing today?"

BORROWER: "Good!"

CALL-AGENT: "Well the reason I'm calling is to respond to an inquiry you made with us for a free mortgage quote to refinance your loan with some additional cash-out. Would you like to speak to our professional lender for a free consultation to learn more about how we can help you with this?"

BORROWER: "Yes, I would."

ASSESSMENT:

CALL-AGENT: "Okay great, to process your request I have just a few questions I would like to ask before passing you over to our senior mortgage specialist at XYZ Mortgage Company (input your company name)."

BORROWER: "Alright."

(Call-Agent reviews mini-1003 application with the borrower)

TRANSFER:

CALL-AGENT: "I'm going to quickly connect you to our senior mortgage specialist at XYZ Mortgage Company (input your company name). The line will be placed on hold but I'll be right back with you Gary."

BORROWER: "Ok, no problem."

CALL-AGENT: "Thank you sir, one moment." (*Homeowner is placed on hold and loan officer is contacted*)

LOAN OFFICER: "Hello!"

CALL-AGENT: "Hi, Paul (name of loan officer) this is Kim at Target Publishers call center. I have Gary Schulmeyer from Florida on the line looking to refinance with some cash-out. His phone number is (305) 555-1793."

LOAN OFFICER: "Alright, thank you!"

CALL-AGENT: "Hello Gary?"

BORROWER: "Yes!"

CALL-AGENT: "Thank you for holding; I have Paul on the line, he's a mortgage specialist who will be happy to assist you further. Go ahead Paul."

LOAN OFFICER: "Hi Gary, How are you doing this afternoon?"

BORROWER: "Good, thank you!" *

*Call-agent exits the call after successfully connecting both parties. Loan officer then receives full application through the lead database just moments after receiving the transfer and can print out for review.