

Verified Lead Script

Below we have outlined the telemarketing script our callers use to qualify potential borrowers. With every homeowner's application we gather they must meet certain filters and criteria before we can set an appointment and refer them directly over to you.

INTRODUCTION:

CALL-AGENT: "Hello, may I speak with James Parcel?"

BORROWER: "Yes, this is him."

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

BORROWER: "I'm doing fine, thanks!"

CALL-AGENT: "The reason I was calling is because we show your address listed at 2835 S. Bennett Dr. and we work with one of your local mortgage companies who helps homeowners in your neighborhood lower their monthly payments, get additional cash, refinance a current mortgage or reduce your debt."

"Would you be interested in being contacted by a professional lender for a free consultation to learn more about one of these services and how it can help you?"

BORROWER: "Yes, I would."

ASSESSMENT:

CALL-AGENT: "Okay great, what type of mortgage service(s) are you looking for? (i.e. refinancing for a better rate, getting additional cash-out, reducing your debt, buying a new home, or a home equity line of credit)."

BORROWER: "Well I currently have a 7.5% fixed rate now and I would like try and get a better rate along with some extra cash-out to help with my home renovations."

CALL-AGENT: "Alright, we have a lender that can further assist you and help obtain the best terms possible. To process your request I have just a few questions I would like to ask before I arrange the call-back appointment with our senior mortgage specialist at ___XYZ Mortgage Company__." (*input company name*).

BORROWER: "Ok, perfect!"

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

SET APPOINTMENT:

CALL-AGENT: "Ok, I have all the information to process your request. I'll arrange an appointment for you with our professional lender at ___XYZ Mortgage Company__" (*input company name*).

"What time is best to speak with our lender?"

BORROWER: "I'm free tomorrow at 4pm"

CALL-AGENT: "Okay, I've scheduled an appointment with our lender to contact you on Tuesday, at 4 pm. Thanks again for your time James and have a good Day / Night. Good-Bye!!!"

BORROWER: "Thank you!"

*Call-agent completes lead report and adds additional notes from the call. Lead is then uploaded and emailed out for delivery to client.

