A Lead Phone Script

Hi \_\_\_\_\_\_\_ this is \_\_\_\_\_\_\_\_ giving you a quick call about your mortgage with Wells Fargo, how you doing today?

Pause...

I was just giving you a quick call to let you know that I received your paperwork about protecting your loan for $280,000. Pause...

Or

I was just giving you a quick call about your inquiry to protect your loan for $280,000. Pause...

I see here that you put down that your birthday is \_\_\_\_\_\_. And your spouse's birthday is \_\_\_\_\_\_\_\_\_, is that correct?

Perfect, I'm just the field underwriter in charge of going over the information with you both. They make me come out to make sure you’re not in a wheelchair or on oxygen. I see your address is\_\_\_\_\_\_\_\_.

Pause...

Thank you for understanding and I'm going to be in your area Monday, what time do you get off work or are you retired?

 I have 5 or 7 pm?

 Can you please grab a pen and paper?

 My name is \_\_\_\_\_\_\_\_and I'll be driving a \_\_\_\_\_\_\_ car and I'll be there at \_\_\_\_\_\_ time on Monday.

 Should I park in the driveway or on the street?

 Is the house number on the mailbox or the house?

 These appointments are very important.

Can you put that information in a spot where you put your important appointments because if we have to reschedule it's going to be a long time before I can get out there.  Is there any reason why you won't be home?

Great I will see you both Monday at \_\_\_\_\_and have a great day.

Objection:

Can you just give us a quote?

You:

Absolutely. I'm just not sure what you would qualify for because we work with over 20 insurance companies. As I stated earlier, they make me come out to verify everything. Does 5 or 7 work best?

Objection:

We're not interested anymore.

You:

No problem that's why I'm calling. Your file is still open so in order for us to disposition your paperwork we need to go over it real quick. Takes about 15 minutes and It doesn't matter to me what you do with it but I'm required to go over it. Does 5 or 7 work best?