



Basic Phone Script IVR Mortgage Lead- Virtual

The key to making this work is your tonality and posture. Remain LOW AND SLOW. Pretend you are a plumber or furnace repair guy and think about what they sound like when they call you to fix your problem...

MENTALITY: This isn't expensive, I'm not going to take much of your time, and I don't care if you get it or not. It's just my job to review with you.

Hello, is this (Client Name First & Last)?

Hey (Client First Name), this is (Your Name). I am calling in regards to your mortgage with (Name of Bank/Lending Institution). Your property that is over on the (Client Address).

(Client First Name), the reason I'm calling is I was actually assigned to some paperwork you had called in on the (Date of Call In). It was regarding your mortgage, that (Loan Amount).

(Client First Name), this is in regards to the loan coverage information for your property where if you were to get sick, like a cancer, or if you passed away making sure that loan be paid off.

You had marked your age here as (Client Age/Date of Birth) and that you're a non-smoker/smoker, is that correct? Well perfect. I did want to ask you, you had marked no for having a co borrower. Is it just you at the property or are you married? You are married, well perfect. I feel bad I only had your name on here, what is your wife's/husband's first name? Okay it's (Spouse/Partner's Name), perfect.

Well (Client First Name), again like I said, my job is the information regarding the loan coverage for the property. Now normally I would have to send an agent from my office to come see you in person but to keep things simple I can do everything over the phone.

Now are you and the wife still working full time or are you both retired? Okay, both of you are still working full time. What time will you both be home from work today and settled? I don't want to get you right when you get home but I do have an opening in my schedule where I can call you between 4:00-4:30 or between 5:00-5:30. What time would work best for you? Okay great.

Last thing, did my phone number pull up for you on Caller ID? I will be calling you back from this same number between 5:00-5:30. Just make sure to put my number in your phone and again my name is (Your First Name & Spell It Out) and my last name is (Your Last Name & Spelled It Out). I look forward to speaking with you later on today. I hope you are having a blessed day. Goodbye.