

Old Lead Script

Hello, is this (Client Name)?

Hey, (Client Name), this is (Your Name) calling. I am calling in regards to your mortgage with (Client Lender) for your property at (Client Address). I am calling to apologize because when you closed on your mortgage, you started receiving a lot of forms about the Mortgage Protection for the property. Do you remember receiving all of those?

"NO" - Well, I apologize again. No one has reached out to you to provide this information.

"YES" - Perfect! Were you able to find coverage for the property?

"NO" - Was it too expensive or did it not make sense for your family?

"Too Expensive" - How much was it exactly? "Client Response" Well, that doesn't seem right. I want to make sure you receive the correct information so you can make the best decision for your family.

"Didn't Make Sense" - Do you have other coverage for the property? "Yes" Did you get the numbers on the mortgage coverage? They are normally cheaper and cover you in the event that you get sick, rather than just death insurance like you currently have. I want to make sure you received the correct information so you can make the best decision for your family.

"YES" - Okay, perfect. Let me check to see if you are in our system.

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I apologize, for some reason you are not showing up in our system. I need to make sure this file was closed correctly. I have a meeting I have to get to, but I need to find a time to speak with you to get this closed up.

Just to verify, you marked your Age/Date of Birth as (Client Age/Date of Birth). Is that correct? Okay, great. Well, my job is very simple. I have to sign off that I provided you with this information regarding the coverage for your property.

Normally, I would have to send an agent out to the house, but to make things simple, I can do this over the phone.

Are you both working full time or are you retired?

Perfect, what time will you both be off work today for me to give you a quick phone call?

"4:00"

I have an opening around 5:00 PM. Would that work okay for you both?

Okay, great.

Do me a favor and save my phone number in your phone. I will be calling you back from this same number, so you know it's me. Again, my name is (Your Name), and that is spelled out (Spell Out Your Name).

Last thing, I am avoiding sending anyone out to the house, so please let me know if something comes up that would make you both unavailable. If I can't get a hold of you, I will have to send this to a different department that normally comes out to the house. It's not a big deal, just let me know if something comes up. I look forward to speaking with you both then.