

Call-in Script

Hey _____ this is _____. I'm the field underwriter assigned to you calling you regarding the Bank of America Mortgage, how's it going? (Usually they say Good, or good how can I help you).

I was calling because you (you guys) had received a notice that you called in about (yesterday, a couple days ago, last week, a while ago, etc.) and it was about the mortgage protection insurance, we haven't gone over with you yet, and it looks like I was assigned to you guys for that since I handle this in the their state....So, they have me doing that by phone with you (you guys) later this afternoon or this evening and I just needed to see what works best for both of you? (They choose a day and time)

Ok so I have you down for later today between 4:30-5:15 – now I will have another family I have to speak to before you guys and if that runs over it may make me late to calling you, so it'll be somewhere between 4:30 and 5:15 when I call you, but once I'm on the phone with you guys, I'll make it quick.....

Now, when I call, I'll just need both of you to be on the phone and have access to email ok?

Ok awesome! I'll call you between 4:30 and 5:15 later today/ tomorrow from this number, ok?

Ok and just remember my name is _____... I'll talk to you guys then.

Telemarket Lead

Hey _____ this is _____. I'm the field underwriter assigned to you calling you regarding the Bank of America Mortgage, how's it going? (Usually they say Good, or good how can I help you).

I was calling because you (you guys) had received a phone call from our office (yesterday, a couple days ago, last week, a while ago, etc.) and it was about the mortgage protection insurance, you used the code word _____. We haven't gone over this with you yet, and it looks like I was assigned to you guys for that since I handle this in the their state....So, they have me doing that by phone with you (you guys) later this afternoon or this evening and I just needed to see what works best for both of you? (They choose a day and time)

Ok so I have you down for later today between 4:30-5:15 – now I will have another family I have to speak to before you guys and if that runs over it may make me late to calling you, so it'll be somewhere between 4:30 and 5:15 when I call you, but once I'm on the phone with you guys, I'll make it quick.....

Now, when I call, I'll just need both of you to be on the phone and have access to email ok?

Ok awesome! I'll call you between 4:30 and 5:15 later today/ tomorrow from this number, ok?

Ok and just remember my name is _____... I'll talk to you guys then.

Mail-in Lead

Hi _____, This is (your first name). I'm the underwriter assigned to you calling regarding the Bank of America mortgage you did a while back. How are you?

Good, thank you. You probably don't remember this but it looks like back when you did the paperwork for the mortgage you received a bunch of letters about the mortgage protection insurance and you filled one out and sent it back. It looks like we never got back with you to go over it and I was assigned to you to do that since this was supposed to be handled back then.....so they have me going over this by phone either later this afternoon or this evening. I was just needing to see what works best for you for about 15 minutes.

(Use the Objection handling sheet to handle objections)

Ok, so I have you down for later today between 4:30-5:15 – now I will have another family I have to speak to before you guys and if that runs over it may make me late to calling you, so it'll be somewhere between 4:30 and 5:15 when I call you, but once I'm on the phone with you guys, I'll make it quick.....

Now, when I call, I'll just need both of you to be on the phone and have access to email ok? Ok, awesome!

I'll call you between 4:30 and 5:15 later today/ tomorrow from this number, ok?

Ok and just remember my name is _____... I'll talk to you guys then.

Online Lead

Hi _____, This is (your first name). I'm the underwriter assigned to you calling regarding the Bank of America mortgage you did a while back. How are you?

Good thank you. You probably don't remember this but it looks like back when you did the paperwork for the mortgage you received a bunch of letters about the mortgage protection insurance and you filled one out and sent it back. It looks like we never got back with you to go over it and I was assigned to you to do that since this was supposed to be handled back then.....so they have me going over this by phone either later this afternoon or this evening so I was just needing to see what works best for you.

(Use the Objection handling sheet to handle objections)

Ok so I have you down for later today between 4:30-5:15 – now I will have another family I have to speak to before you guys and if that runs over it may make me late to calling you, so it'll be somewhere between 4:30 and 5:15 when I call you, but once I'm on the phone with you guys, I'll make it quick.....

Now, when I call, I'll just need both of you to be on the phone and have access to email ok? Ok awesome!

I'll call you between 4:30 and 5:15 later today/ tomorrow from this number, ok?

Ok, and just remember my name is _____... I'll talk to you guys then.