

Best Practices Call Guide

PHONE SCRIPT:

“Hello this is --__ --(Name) with ____(Company) . I just got your information through _____.com (Source) and I want to see how I can help you with your new home.”

If it's a voicemail: Repeat your number twice.

If it's a live call:

Launch into buyer questions (See examples below). Do not ask about financials in the first 5 minutes. This call is about building trust and getting them to open up about what they want. Most lenders want to only discuss financing. People are more interested in the property than the scary bill they will be paying for the next 30 years.

BUYER QUESTIONS

- Where are you most interested in finding a new home? (Try to get them to talk about their current home and what they want in a new home.)
- According to my information, you own a home now. Is that accurate? (You are looking for a listing here but don't ask for it yet.)
- How soon are you looking to move?
- How many beds / baths are you looking for?
- Do you have kids? If so, how many? (Relate)
- Do you have pets? If so, what type? (Relate)
- How big of a yard appeals to you? (And your family?) We are hoping that they have a big family and if they have co-purchasers if needed without asking directly.
- Do you prefer having a deck or patio?
- Do you need a garage? If so how many cars?

We are taking notes throughout the conversation and letting them know their words are so important that we are memorizing each and every word.



We are trying to get the buyer to visualize themselves in their new home and increase their dissatisfaction with their current situation as much as possible without being too obvious about it. We want them to see themselves in their new home with a BBQ in the backyard and all of their family and friends having a great time in the new home.

We have not asked about credit worthiness or income until we have them feeling good about the conversation we are having with them.

After we get the buyer to open up, then we can launch into their job as we get closer to their financials. If we ever feel like they are shutting us down, ask more questions.

Once you build rapport, launch into your mini app. If they shut down ask more questions about what they are looking for in a property.

If they say they are working with someone else, remind them that multiple inquires do not affect their credit score; shopping around could save them tens of thousands over the course of their loan.

If they are unwilling to discuss financing at all, ask the magic question.

MAGIC QUESTION EXAMPLE:

When someone says they are not interested in buying a home, Do this:

“I completely understand, but can I ask you one question?”

“Sure.”

“If I could find you the perfect home, in the perfect neighborhood, at the perfect price...Would you want to see it?”

Everyone answers “Yes” to this question and now you are open to ask what makes the perfect home for them. Ask a lot of questions and tell them that whatever they want is doable. Don’t rain on their parade.

Tell them you are confident that you can make this happen for them and make an appointment to meet with them at your office. Chances are they were just trying to avoid making a decision and you have helped them move one step closer to improving their lives.

EXAMPLE:

“I am not interested in buying right now.” or “I was just shopping online.”

“That’s fine but just in case you are in a better position later on. Can I tell you what I do real quick?”

“Yes.”

“My job is to help people buy a new home. I help people buy a new home by saving as much money possible on their mortgage. As I have hundreds of products available, I am able to negotiate the best financing for the people that I help. So if you are ever interested in buying a home and saving as much money in the process as possible, feel free to reach out to me”



Member Services is here to assist. Should any questions arise, please call us at (800) 230-9519, Monday through Friday, 9AM-5PM EST.

