

# LOCKING DOWN NEW W.H.A.L.E. AGENTS

Script & Guidelines for Hunting  
**NEW** W.H.A.L.E. Agents



W.H.A.L.E. = Worth Helping A Little Extra

## Immediate Objectives:

- Grab your **Good W.H.A.L.E. Hunting** eligibility checklist for each W.H.A.L.E. you want to target, and use it as your hit list for setting appointments with new agents that have W.H.A.L.E. status.
- Call and introduce yourself using the Bullet Proof Unique Value Proposition outlined below
- Establish yourself as the mortgage professional of choice for your W.H.A.L.E.'s and secure more home buyer pre-approval leads through their marketing efforts and word of mouth business.

### In a Nutshell

1. Identify your W.H.A.L.E.'s.
2. Approach your W.H.A.L.E.'s with real value and differentiate yourself from the other loan officers that are also trying to earn their business.
3. Establish loyal W.H.A.L.E.'s by bringing value and qualified leads to the table, while strategically cementing your business into all of their marketing efforts.



# Locking Down New W.H.A.L.E. Agents

Here's a great strategy to get your foot in the door and approach W.H.A.L.E.'s you've never spoken with: introduce yourself along with a plan that includes lead generation technology paired with direct consulting designed to help them generate more business!

There is no better way to get a good Realtor (a W.H.A.L.E.) fired up and differentiate yourself from other L.O.'s than by making it clear that your goal, as their preferred mortgage partner, is to help them grow their business (without having to pay for their marketing)!

Some of the other leadPops Marketing Scripts & Guides highlight how to create relationships with EXISTING W.H.A.L.E.'s.

Here's the low-down on how to go after NEW W.H.A.L.E. relationships to further grow your sphere of influence and referral network.

**ALSO SEE: Good W.H.A.L.E. Hunting** PDF --  
*Eligibility Checklist for Hunting NEW W.H.A.L.E. Agents.*

**Passion & Conviction** are the keys to success on any open. Use your voice inflection to take potential clients on an emotional rollercoaster!



## **Puzzled & Curious -> Matter-of-Fact & No B.S. -> Shock & Dismay -> Excitement & Hope – use these as needed!**

- Have a genuine desire to help your W.H.A.L.E.'s
- Ask good questions and be an excellent listener
- Set the solid appointment – your main goal is to set up another call or meeting!
- DON'T SELL ON THE OPEN!

### **W.H.A.L.E. OPEN SCRIPT:**

**“Hello \_\_\_\_\_, this is \_\_\_\_\_. I came across your website  
\_\_\_\_\_?” (OR – I came across your page on Realtor.com?)**

**“Great, well \_\_\_\_\_, let me cut to the chase. I’m actually a Mortgage  
Consultant with \_\_\_\_\_.”**

**“Frankly, I compete with the Loan Officers you’re currently working with.”**

**“I’m sure most of them are good people, but my experience is that typically LO’s  
don’t do ANYTHING to actually help their Realtor partners grow THEIR business.”**

**“It’s like they’re just kind of sitting back with their hand out waiting for  
referrals... would you agree?”**

Pause here and let them chime in. This is where you’ll be delighted to hear many agents lay into their current loan officer relationships.... all of a sudden, it’s you and that Realtor having a chuckle about the absurdity of loan officers expecting referrals for nothing.



## W.H.A.L.E. OPEN SCRIPT:

**“Alright, so I take a completely different approach. I invest in tools and strategies to help my agents get better results from their marketing efforts and to generate more qualified leads.”**

**“I don’t have a Realtor in your area that I’m doing this with currently... so all I was hoping to do today is chat with you literally for a couple minutes - just to learn more about you -- your goals, what’s working, what isn’t – just a few questions I have to figure out where we can help, and see if we’re a good match.”**

**“If so and it makes sense, we can set up another call or meet in person to discuss.” “2-3 minutes is all we need today.”**

You do not need to ask for permission to keep going. Next, you’re going to ask a few good open-ended questions here. Get them talking about themselves – Realtors love doing that! Be an excellent listener. Take notes and look for ways to help them.

**FIRST OPEN ENDED QUESTION: “So, how long have you been in the Real Estate business?”**



## W.H.A.L.E. OPEN SCRIPT:

### OPEN ENDED QUESTIONS:

- Of all your marketing efforts, what's currently working best for you?
- What does your ideal customer profile look like?
- How many visitors do you get to your website each month?
- How many open houses are you doing each month?
- What are some of the challenges you face in your business?
- On average, how many transactions are you closing per month, and where would you like to be?
- Just out of curiosity -- what are some your other L.O.'s doing to help you with marketing?

**"Great \_\_\_\_\_, thanks for sharing. This is all really good stuff. Based on your answers, I definitely think this is going to be a good fit."**

**"In a nutshell, I use the same technology and strategies that some of the most successful companies in the world are using to generate qualified leads..."**

**"I share these leads with my Realtors, and I also set up my preferred agents with these same tools and strategies so that you can get better results from everything you're already doing."**



## W.H.A.L.E. OPEN SCRIPT:

**“This is the same formula companies like Zillow, Trulia, Homes.com, Quicken Loans, LendingTree, LowerMyBills.com -- who sold to Experian for \$330M using this same exact formula -- are using to convert website visitors and anonymous clicks into actual clients!”**

**“You can’t sell houses to a bunch of clicks, right? Without effective capture technology, driving a bunch of traffic through online marketing, SEO, traditional marketing efforts, etc. doesn’t do anything for you!” “That’s like running the A/C but leaving all the windows down!”**

**“Great, \_\_\_\_\_, well the solution I’m offering will fix that for you too. It’s called Conversion Rate Optimization and it will help get you a higher ROI on all of your marketing efforts.”**

**“It’s also an incredibly powerful tool for your listing presentations, which we can discuss more on another call.”**

**“IT’S NOT GOING TO COST YOU ANYTHING, and the best part is: you’re guaranteed to generate business from it!”**

**“So, \_\_\_\_\_, if that sounds good, I’d love to set up an appointment to show how exactly how it works and explain everything in more detail.”**





## SET THE SOLID APPOINTMENT!

Your leadPops marketing strategies will take the lead on the next call for you. All you need to do it make sure your W.H.A.L.E.'s show up to your appointments!

Remember to sprinkle in some strategic open-ended questions along the way and get them talking about their business. Plant seeds of value. Uncover hot-buttons and pain-points, and get them talking and thinking about the fact that (for the most part) the other L.O.'s and mortgage professionals they work with aren't doing ANYTHING to help them generate business!

While other L.O.'s are just waiting on Realtors to send them referrals, or at best bringing them coffee and donuts, you're actually investing time and money, and putting effort into helping your preferred Realtors (W.H.A.L.E.'s) generate more business!

## 3 ACTION ITEMS TALK

1. What the most successful companies in the world are doing to generate quality leads from their marketing efforts.
2. How they (your Realtors) can use the same technology and strategy in their B2C and B2B marketing efforts.
3. A guaranteed increase in their marketing ROI, referrals and referral sources, qualified leads, etc.

