

BEST RATE REFERRALS

# Purchase Quick Script



## PURCHASE SCRIPT

Hi, is (first name) home. This is (your first name) with (company) here in (client's state).

I am calling to see if you are tired of throwing money away on rent? Well if so we are working with different lenders that specialize in converting renters to buyers. They are currently offering some great first time buyer programs. If you were to buy a home how many rooms would you need? What is an affordable monthly payment for you?

*Proceed to ask questions on lead sheet.*

# PURCHASE LEAD SHEET

Telemarketer: \_\_\_\_\_ Date: \_\_\_\_\_ Time: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Current Rent: \_\_\_\_\_ Per Month: \_\_\_\_\_

Months at Current Address: \_\_\_\_\_ How Many Months Left on Your Lease: \_\_\_\_\_

Any Car Payments? Y N How Much? \_\_\_\_\_/mo

Any Student Loans? Y N How Much Owed? \_\_\_\_\_

Occupation/Type of Work: \_\_\_\_\_

How Long in This Line of Work: \_\_\_\_\_

Gross Monthly Income: \_\_\_\_\_

Are You Married? Y N

Spouse Name: \_\_\_\_\_

Spouse Occupation: \_\_\_\_\_

How Long in This Line of Work: \_\_\_\_\_

Spouse's Gross Monthly Income: \_\_\_\_\_

How Many Bedrooms Would You Need? 1 2 3 4 5

Best Time to Contact? \_\_\_Morning \_\_\_Afternoon \_\_\_Evening Cell: \_\_\_\_\_

How Do You Rate Your Credit? \_\_\_Excellent \_\_\_Good \_\_\_Fair \_\_\_Poor

SSN: His: \_\_\_\_\_ Hers: \_\_\_\_\_

NOTES: \_\_\_\_\_

\_\_\_\_\_

# TELEMARKETING TIPS

## ▶ 1. KNOW YOUR TARGET MARKET

- Research the market. Know what genre or type of person you are calling
- Use targeted marketing lists (we can provide you with targeted lists)  
[contact@bestratereferrals.com](mailto:contact@bestratereferrals.com)

## ▶ 2. KNOW YOUR PRODUCT

- The more you know your product the more the prospect will listen!!
- Remember you're the professional, they need you to show them!!

**KNOWLEDGE = CONFIDENCE**

**CONFIDENCE = BELIEF**

**BELIEF = TRUST**

**TRUST = SALES**

## ▶ 3. KNOW YOUR PROSPECT'S NEEDS

- Understand their "true" possible situation
- Put yourself in their shoes, listen to the prospect!!!
- If you know what they are trying to accomplish, it makes selling the loan easy

## ▶ 4. TERMINOLOGY – Helpful keywords and phrases

- Use "Ok" after every question or two. Saying "OK" is a very powerful trick. After you say it enough to a prospect they will just say OK back. (don't say: "Is that OK" - Just say "OK".)
- "Savings" – prospects respond when you tell them how much they will save monthly or annually by refinancing.
- "Mortgage Analysis" & "Free Quote" – These are very powerful phrases which prompt response from the prospect.
- "Accomplish" – Asking a prospect what their goals are or what they want to accomplish is a powerful way of getting the prospect to talk about their private financial plans.

## ▶ 5. MINDSET

- Be aggressive, but not pushy. Stay professional!
- Be polite & courteous
- Be knowledgeable

**• REMEMBER YOU ARE THE PROFESSIONAL – THEY NEED YOU!!!!**