**Virtual Phone Script (Coach Gibbs Version)**

Client: Hello

Agent: (Say this first sentence without pausing and assume it is the person on lead)

Hi, (client first name) this is (your first and last name). I’m calling regarding your mortgage with (bank name) for your property on (mortgage address). How are you doing today?

**IVR Lead:** It looks like you received a pink, green or maybe a blue card in the mail recently that had you call an automated line to verify some of your information. I have your loan amount as $$ and your age is XX, is that correct?

**Mailback lead:** I have the paperwork you filled out and mailed back into our mortgage protection center and I have your loan as $$ and you wrote down your age as $$ is that correct?

I’m just the agent who is in charge of going over the loan protection options that weren’t provided for you at closing and I’m setting up appointments over the phone for later today, do you have a spouse or someone you live with?

It should only take about 15-20 minutes. What time do you get off work or are you retired? (**Verify they will both be there)**

**Example:** Does 5:30 or 7:30 work? (**Set the appointment and give only two options)**

**(Book appointments every hour)**

Perfect, can you grab a pen and paper? Please write my Name and the time down. (Spell out your full name very slow)

I want to make sure you're not driving and at a place where you can take notes. Will you be at home around \_\_\_\_\_?

Okay great! These appointments are very important and I want to make sure you will pick up the phone when I call around \_\_\_\_\_. Give me 15-20 minutes in case I am running behind and maybe helping another family.

One more thing, I’m going to send you a confirmation text with my name and time for the appointment. This appointment is very important so we make sure you get the options you requested and deserve. Please add this appointment in your phone calendar and set the reminder 10 minutes prior to appt time. If you cannot make it, please do me the courtesy of texting me back.

Thank you and I will speak with you and your spouse around \_\_\_\_\_\_\_.