**IVR (A1, B or C LEADS) PHONE SCRIPT**

Hello BOB (homeowner name), This is DAVE SMITH (your name). I am calling in regards to your mortgage with WELLS FARGO for your property on FLOWER DRIVE. How are you doing this morning?

ALTERNATE INTRO:
Hello BOB (homeowner), This is DAVE SMITH (your name). Bare with me, I am not a telemarketer.
I am calling in regards to your mortgage with WELLS FARGO for your property on FLOWER DRIVE.

It looks like you received a card in the mail a few days (weeks or months)\* ago
that had you call our automated system to verify some of your information, you may not remember doing that, but…..

I’m the field underwriter who is in charge of going over the mortgage protection options that weren’t provided for you at closing. Let me make sure I have all the right info,
[Verify Loan amount/info] [Is there a co-borrower or spouse?]

It should only take about 15 minutes and I am going to be in your area tomorrow and FRIDAY, and wanted to see what time would work best, Afternoon or Evenings?

[f there is a co-borrower or spouse? Verify they will be there]

TIE DOWN:

I need to give you a confirmation number, can you grab a pen real quick.

[give them your insurance license number….just the first 6 numbers (skip letters)]
ok, and again my name is DAVE SMITH, and we are confirmed for FRIDAY at 4pm.

And just to help me see your home when I am driving up, are the numbers on the home or on the mailbox.

And is it best to park in the driveway or on the street?

Perfect, I Drive a BLUE TOYOTA just so you know who is pulling up at X time.

Ok and one last question, do you see any reason why you wouldn’t be there (overtime, kids games, dr appts)

Awesome I will see you at (Day and Time)

\*The IVR lead has a “record date” which is the date they called into the system, so this gives you an idea of when they closed on loan.

\*\*OBJECTION: Because this is a State Regulated program, I am required to go over this information with you, but you are not obligated to do anything. Does (day) or (day) work better for you?