



VA Loan Officer B2B Call Flow/Structure/Templates

To Help You Close More Deals, In A More Timely Fashion, More Often, For More Money

General Call Structure (Modular):

- 1. Purpose of the call, set the intention and outcome. Frame the close from the beginning.**
- 2. Learn about them. Open the relationship and build rapport with your prospect to note their background, history, passions, their 'Why', etc.**
- 3. The Interview - See if you're a good fit to do business with one another.**
- 4. Explain the program if it's a fit (what's included with each lead, how they're sources and how they're delivered/fulfilled).**
- 5. Ask for the close - "Here's what happens next."**

The purpose of this outline is to provide a modular overview of talking points and a structure to lead your calls with so that they're similar every time. Not every question/talking point needs to be hit obviously, but the overall structure should remain the same and lead to the close.

1. Setting the purpose of the call

Hey **<FName>**, excited to speak with you today! The reason I'm calling is that you've responded to our Facebook Advertisement RE: VA Loan Program requesting more Deals Per Month...

How long have you been serving Veterans?

We only work with the best loan partners in the business, who are ready & willing to add an additional 10-20 new closed deals per month to their current sales pipeline... and we're looking for just a few more partners in **<State>**...

How many VA Loans is your team processing per month now?

How many new VA Loans would you like to be processing per month within the next 90 days?

Okay great, over the course of this call I'm going to ask a few more questions and discuss a few more things with you to discover if we might be a good fit to work together...

If we are and it all makes great sense on both ends, I'm going to invite you to partner with us-- does that make sense?

2. Learn About Them - Build Rapport/Learn their sticking points/buying hot buttons

You've been serving Veterans in Kentucky for XX years... Why is that?

Around 20% of all loans we're generating for current partners are Refinance requests, can you process those as well?

What does your perfect, ideal, **qualified** VA Program candidate look like? *(Debt to Income Ratio/Credit Score/Timeline/Current situation/etc.)*

Okay great, so the perfect Qualified VA Candidate looks like _____ ...

Most of our current clients are able to close the new, qualified VA business we're sending them at anywhere from 8-12%. If you had 10 of those ideal candidates sitting in front of you now, how many of those would you close within the next 45 days or less on average?

Is your business able and capable of handling an additional 50-100 new opportunities every month right now? Could you process them efficiently when we send them?

Geolocation where leads can be generated within - where are they coming from now?

3. The Interview

Use your notes from Step 2 and hit anything that comes up here instead of right away. Flow the questions naturally without rushing and make sure you're taking notes in your CRM.

Well Bill, I have to say-- from the answers you've given, everything is looking good on my end. Based on everything we've discussed thus far, are there any

reasons why you wouldn't want to work with us right away? **(leads to #4)**

<Pricing> I'm glad you asked about the price Let's talk about our program:

4. About Our Program

Our program consists of 2 primary functions: Finding only the most responsive Veterans in your target area, **and 2:** delivering those to you and your sales team right away.

Each Veteran we send is exclusively provided to your office in real-time and will not be shared with any other Loan Officer. If you select XYZ city or area, those leads are yours to have and sell and will never be given to anyone else... ever.

We will deliver to you what's known in the industry as a "long form opt-in" which is essentially a short application that includes just about everything other than their Social Security Number...

Have you heard about "Long Form Optins"?

They're the most sought-after and highest-quality leads available in the industry... The big guys get away with selling these same type of opportunities for upwards of \$75-\$125 all day, and let me tell you exactly why... We're going to send you:

Their Full Name

Cell Phone Number

Email Address (explain database marketing as well if you want...)

Their self-reported FICO Credit Score to give you an idea of where they are

If it's a New Purchase or Refi request so that you know ahead of time

A timeline of when this Veteran wants to move forward with you on the next step

Exactly what price range they want to request a loan on
Which branch of the military they've served
Their current address

We're going to send all of this to you via e-mail immediately when the opportunity is created. It's then up to you to do what you do best!

Now you see why the big shops can charge up to \$150 per lead they're delivering to Loan Officers, right...

Okay, great so let's go over pricing:

(Give your pricing, I personally charge \$32.50 per lead with a min. Order of 50 leads over 30 days)

5. The Close

Bill, we've went over every detail imaginable on today's call and based on everything we've discussed, I'm ready to get started with you. Are you ready to start having these new VA Loan Opportunities delivered to your inbox by next week?

Great, here's what happens next:

I'm going to e-mail you an invoice for (whatever agreed upon) that you can file for your own record-keeping purposes. You'll receive that within X hours/minutes.

Once that payment is made we'll transfer your account over to our Media Buying stage to get the campaign started. If you can make the starter payment today you should have this program started within X days. Sound good?

Ok great, do you want to submit the starter payment via CC by phone right now to get this thing kicked off?

(If not explain a link with the invoice will be included in the email. The link will expire within XX hours if it's not paid.)



Now go get it...