

Hi {lead_name}, This is Alex here on behalf of ABC Mortgage. We just received your inquiry online. Would you prefer to chat via text message or should I give you a quick call so that I can assist you?

5:37 PM

Is there a more convenient time to talk?

5:50 PM

Follow up

Still interested?

9:13 AM

Yes

Great. I would be happy to help. Are you looking to lower your rate or take some cash out?

yea, tried once before

Got it. What is your current mortgage payment?

Just getting started.

Thanks. Have you had any major financial changes in the last year?

Been at the same job for 5 years.

Awesome. And is your credit score above 580?

Yes

Got it. And lastly, when would be the best time for one of our team members to contact you and discuss next steps?

Fridays afternoons are best.

Sounds good, how Friday at 4pm?

That works.

Great, I have all of the information I need and I will get this info over to our team ASAP. If there is a better time to reach you, please let me know. I hope you have a great rest of your day!

✓ Update CRM



Appointment Set

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No thanks.

No worries. I understand if you don't want to connect yet. Would it be easier if we sent you a link to an online pre-approval portal?

Sure

Great, I have all of the information I need and I will get this info over to our team to followup on. Click here to get started with your online pre-approval: apply.abcmortgage.com

 Update CRM**Qualified**