

Company: CitiFinancial

Project: Sales script

Objective: Provide guidance to branch employees when they're speaking to customers about a new product

JENNIFER BROZIC

Portfolio

copy excerpt

A. Greet Customer

Hi, Mr./Mrs./Ms. _____. This is _____ from CitiFinancial. How are you doing today? It's been some time since we last talked, and I wanted to give you a call to tell you about a new product we're offering.

Now, at CitiFinancial, we can offer you a mortgage product to help you finance the purchase of your next home. So, when you decide it's time to make the move to your next home, you won't have to find another lender. With our new mortgage products, we have an affordable solution to fit your budget.

Do you have a few minutes, so I can tell you more about the products we have available?

B. Listen. Pause, let the customer respond.

If the customer says **no**, thank them for their time and remind them that we'll be able to handle their mortgage needs in the future...

If the customer says **yes**, continue:

We're currently offering both fixed and variable rate mortgages. With our fixed rate product, your interest rate will not change over the life of your loan. This means you'll enjoy the predictability and convenience of paying a fixed dollar amount each month. Our variable rate mortgage offers a lower initial interest rate for the first 12 or 24 months of your loan, providing you the flexibility to adjust your budget to meet your needs.

C. Determine where the customer is in the Home Buying Process

1. Determine if the customer is currently looking for a home...
 - If "yes," then proceed to step 2.
2. Determine if the customer has chosen a location (This will help you determine how close the customer is to closing on their home)...
 - If "yes," then proceed to step 3.
3. Determine if the customer has found a house they want to purchase...
 - If "yes," let the customer know we can finance up to 75% of the purchase of their home...

This script was created to help branch employees introduce a new mortgage product to customers. It helped guide employees through the conversation, ensuring they gathered all pertinent information from the customers.