

The Structure of a Proper Follow Up

STEP 1: THANK THE CLIENT (PICK ONE)

Thank you so much for being available for our appointment.

I appreciate you taking a moment to revisit this.

I'm so glad you picked up.

STEP 2: IT IS ALWAYS GOOD NEWS (PICK ONE)

The good news is rates went up, but I spoke to my Team Leader, and we can still offer you what we discussed yesterday.

The good news is rates didn't move so we can still offer what we discussed before.

The good news is rates dipped this morning putting us in a position to do even better than we discussed before.

STEP 3: RECAP GOALS OR CREATE URGENCY (PICK ONE)

Just to review the goals we're accomplishing **Goal 1**, **Goal 2**, and **Goal 3**.

I'm sure you're aware but most financial experts are talking about the rates increasing in the next day or two which is why it's important we get this off your plate and accomplish your goals of **Goal 1**, **Goal 2**, and **Goal 3**.

To recap, the loan helps you accomplish **Goal 1**, **Goal 2** and **Goal 3**.

STEP 4: PIVOT TO THE SALE (PICK ONE)

So, what questions do you have before we get started?

So, for the commitment we were discussing I believe you said you wanted to put that on the Visa, correct?

So, I'm going to reach for an application, who do you do your homeowner's insurance with?