

## Inbound call jotter

Your objective is to get to know your customer, get housetype/plot specific and achieve a next step to a (qualified) online meeting.

### Pick up and reward

Good morning/afternoon, this is [name] at [site name] how can I help you?

Be glad to hear from your customer – upbeat and positive.

- Reward
- Build rapport

### Identify your caller

Who's speaking please?

- Don't proceed without knowing who you are speaking to
- Take the caller's name and use it straight away
- If you have caller ID, jot the number down
- Start the conversation and come back to the personal details as you earn them

### Thank the customer by name

Thank you [name], it's a pleasure to speak to you. I'd love to help you with [reason for call]

### Start with ...

- Tell me what you're looking for in your new home
- Who will be living in the house?
- What's prompted you to look today?
- Will you be using a mortgage to purchase your new home?
- What's your current plan for financing a new home?
- When ideally are you looking for in your new home? Why is that important to you?
- Will you be selling another home to buy this one?
- What else is important for you in the area?
- Are there any other specific things I need to look at for you?
- Based on the financial advice you've had so far, what is your plan to finance the home?
- I recommend to all my customers to explore as much advice as possible for the best mortgage arrangements -whoever you use to get your mortgage, you need someone who specialises in new homes and has access to the open market
- Have you spent time here on the development?
- Have you spent long online?
- What else have you seen that you like?
- What do you know about us as a business?

### Start to get housetype/plot specific

Based on what you have told me so far, I'd love to

...

- Show you [housetype] as a starting point, it would give you x, y and z. It's on the market for £xxx,xxx and will be ready to move into by [expected completion]
- You mentioned plot 123 from your time on the website, what was it about that home you liked?
- Let's look at plot 123 as a starting point ...

### Do you have a few minutes now for us to jump to a quick online meeting, I'd love to show you the home we were just talking about?'

- Arrange this now or make time in the next hour to schedule an online meeting
- If you are sending information to your customer then use what you are sending to lead into an online meeting to progress them in their search for their new home
- Use any time between this call and your online meeting to introduce a financial advisor who can give an immediate overview of what's possible for this customer and the home you are going to be looking at

- Zoom
- FaceTime
- WhatsApp
- WeChat
- Other?

<b>Reason for call</b>			
<b>Name</b>		<b>Mobile/telephone</b>	
<b>Email</b>		<b>Postcode</b>	
<b>(Complete address)</b>			
<b>Type of home</b>		<b>Finance</b>	
<b>Time</b>		<b>Where are they living now?</b> Catch the postcode in this conversation	
<b>What else is important to you?</b> Notes		<b>Have your WHY buy PowerPhrases ready to use</b> Why buy from you/your brand Why buy New Why buy Now Why buy Here  Promote your development Add value to the housetype/plot Get plot specific	
<b>Earn the personal details as you go</b>			
Are you happy to receive marketing information from us about your property search via phone, SMS, email and/or post?		Willing?	Able?
<ul style="list-style-type: none"> <li>• Call or text you with time-sensitive offers and information – personalised to you!</li> <li>• Arranging for you to come and view our stunning new homes.</li> <li>• Know as soon as new homes and developments close to you are released.</li> <li>• Receive exclusive and personalised event invitations and details.</li> </ul>			
In addition to responding to this immediate enquiry, we may contact you with our latest news and updates about homes that match your requirements and information that will help you in your new home search.			
Are you happy to be contacted using all of these details?			Ready?