The Defining Difference
BY CINDY ERTMAN

Past Client Check-in Call Script

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Reconnecting with past clients can be one of the greatest sources of new business and referrals. Top producing loan originators know that incorporating a past client campaign into their overall marketing strategy is key to sustaining relationships that will continue pay dividends in the long run. Use the below easy-to-follow guide to reconnect with and reengage your past clients and be sure to set a specific time to check in with each client so that it doesn't fall off your radar.

Past Client Check-in Call Script:

Hi this is <Name> with <Company>. How are you? I just wanted to give you a quick call to check in and see how you are doing with your home and your mortgage?

Questions to Ask During Your Call:

1. Checking in on your home and your mortgage
2. How are you and your family doing?
3. How's your job going- have you had any major life changes recently?
4. How long do you think you will stay in your current home?
5. I'd love to get your updated contact information. Can I confirm your updated cell phone and email address so you are current in our system?
6. I just wanted to share why many of our clients are actually refinancing right now, obviously it's not due to interest rates:
   - To pull cash out for home improvement
   - To purchase investment property
   - To purchase second homes
   - To consolidate debt
   - To pay for college education
   - To diversify assets and prepare for retirement planning
   - To buy another home if you are going through a divorce
7. Three financial services that many of our clients need once they buy a home are a financial planner, a CPA and a trust attorney. Are you happy with your financial service providers currently or would you like us to refer you to someone we know, like and trust?
8. Are you interested in scheduling a time to talk about your current financial needs?
9. And just a reminder, we are 100% referral based. If you have any friends, family members or coworkers who are looking to either refinance or get pre-qualified for a purchase we would be so grateful for your referrals.

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Follow up:

1. Invite the client to all social channels
2. Update the database with updated emails, cell phone numbers, and notes from call
3. Create a consistent system to communicate with your past client database on at least a monthly basis via email, phone calls, hard mail marketing and social media campaigns
4. Send a handwritten note. *"So glad we connected and thank you for updating me on your current situation. We look forward to being of service to you and your friends and family in the future!"*
5. Call referring Realtor and give them an update on the client
6. If they are interested in your referral to financial service providers, follow up with an introduction to your referral source