

# GIETI ON THIE IEXIPIRIESS CHECK OUT THE LIGHTNING FAST LOS FROM THE REVERSE MORTGAGE DOCUMENT EXPERTS



Request a free demo at

BAY DOCS.net



888.297.3627



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# Preparation is everything

- Email Zoom instructions to homeowner
- Include a short Zoom tutorial (YouTube)
- When sending a calendar invitation use name that's interesting and compelling
- Prepare any quotes/illustrations when possible
- Don't lock them out: enable join before host
- Look them up on Google, social media or LinkedIn (anonymous mode)

# Just Act Naturally

- Practice a few sessions solo (record!)
- Look at the camera!
- People are nicer to those they can see
- Watch your body language & posture
- Avoid giving the 'sly eye'

# Lights, camera- action!

- Improve your lighting
- Elevate your laptop for web-cam





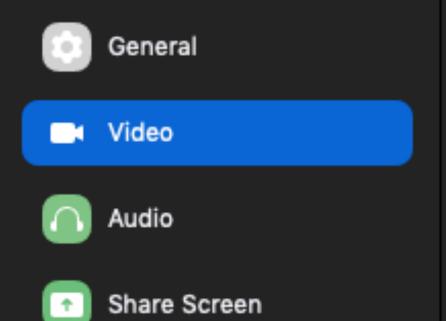


BEFORE



# ZOOM

#### Settings





Background & Filters



Profile

Statistics

Keyboard Shortcuts

Accessibility



#### Camera

FaceTime HD Camera (Built-in)

Original ratio HD Mirror my video

#### My Video

Touch up my appearance

Adjust for low light

Always display participant name on their videos

Turn off my video when joining a meeting

Always show video preview dialog when joining a video meeting



- \* This isn't a 'please like me' video date
- \*\* You're somewhere between video educator and entertainer
- \*\* Use a structured sales process

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# Set the stage

- Face the light...
- You can record Zoom sessions
- Background noise? Microphone
- Mirror your customer with Zoom backgrounds-
- How to dress (put them at ease)

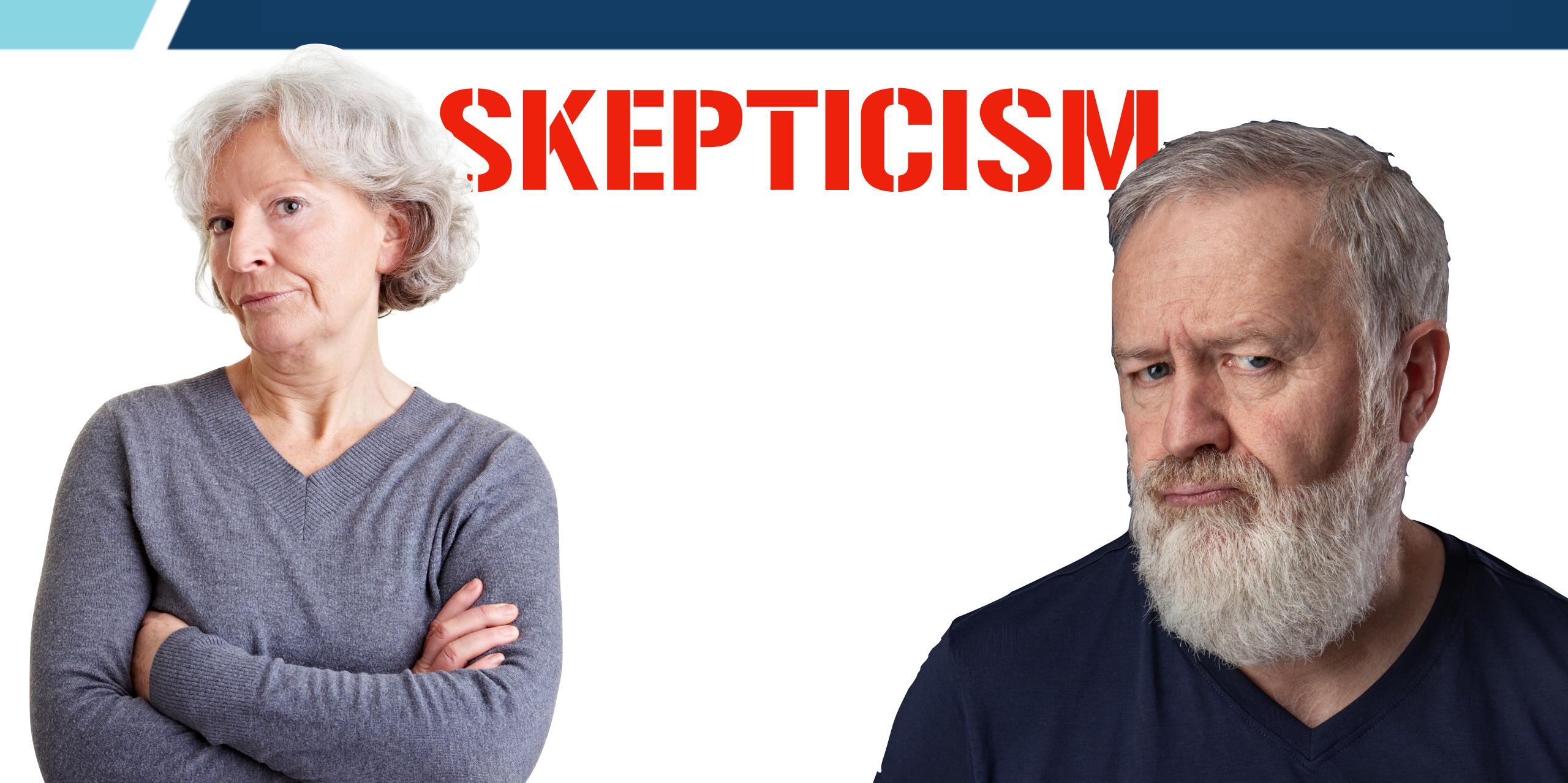
#### What is the 1st sale?

- What do you want them to do?
- 2 questions to always ask (the why & time)
- Are you asking for the sale?
- How will you digitally engage? App?
- Mirror your customer with Zoom backgrounds

#### Create a 'deck'

- Use bold yet simple visuals
- Have a narrative and follow the plot
- Keep them visually engaged- especially on recorded video messages
- Good privacy practices are a must

#### MOST HAVE THIS IN COMMON





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#### ASKTHIS ONE QUESTION



#### SOCIAL PROOF





#### **HECM Neighborhood Widget**

**Grab Attention. Capture Leads** 



Place our interactive, engaging widget on the bottom of your site's home page to show visitors just how popular reverse mortgages are where they live.

#### You can even include an interactive map of their search results!

We'll customize this widget to include your brand colors, revise the language to match your style, and of course, insert your name and picture.

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Select a demo zip code here to learn more...

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**Find Out** 



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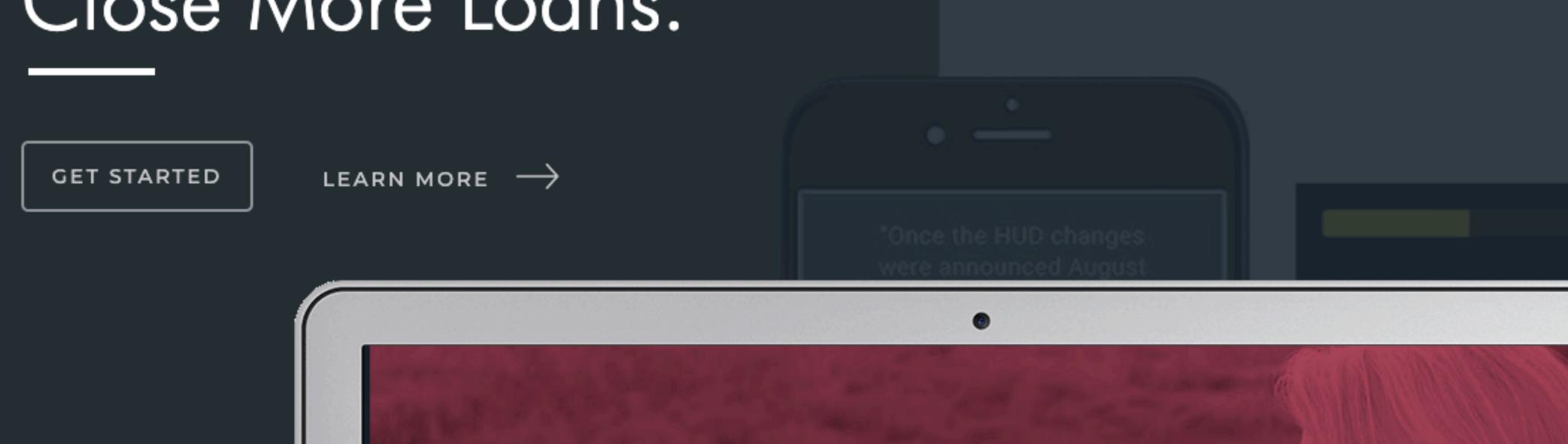


# Will they find you online?



MYLOANOFFICER.US

#### Get Online. Establish New Leads. Close More Loans.



A Reverse Mortgage could make all the difference.

For a personal consultation, contact Mike Mortgage today!

### To Get Started Today Contact



Mike Floth

President mike@reversefocus.com (530) 242-4144

## Start with the end in mind

- What are their goals?
- What would make this meeting a success?
- How much research have they done?
- What's most important? Cash flow? Choices?
- Be prepared to run a live 'what-if' scenario showing before/after RM.



## Don't bore them!

- Screen-sharing opens limitless options
- ZOOM...not the app but on your screen
- Use simple clear concept images
- Make it about them...their situation

# Wrapping it up

- Hard copy of materials?
- Loom video works easily & is effective
- Thank them for their time and mention your next meeting or...
- Send them a Calendly Link to schedule
- Best to follow up in 24-48 hours



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#### Know your market- Get the Widget



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