

**THE REVERSE MORTGAGE**  
**CORRESPONDENT AND ORIGINATORS**  
**GUIDE TO MASTER FOLLOW UP**

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**THE REVERSE MORTGAGE**  
**Loan Officer, Branch Manager**  
**Broker, Correspondent**  
**GUIDE TO MASTER FOLLOW UP**  
**In Your Reverse Mortgage Business**

Are you having to mortgage your own house to get qualified leads and prospective clients for your reverse mortgage pipeline, but those leads and prospect seem to slip away, taking your money and their money with them, if so, then this could be the most important and exciting message you have ever read...

Because in the next 37 pages, I, Sam Collins, President of Sam Collins Reverse Marketing, LLC am going to show you....

**“How You Can Effortlessly Maximize the Value from Your Senior Prospects Utilizing Methods and Strategies that Build Solid Relationships and a Continuous Stream of Business”**

**To My Fellow Reverse Mortgage Professionals:**

I need your help – if you could do a small favor to help me out with a little test. It will only take a couple of seconds, I promise.....

Ok, ready?

Onward...here we go...

**“Put your hand up if you have a list of Senior prospects or Leads that you know deep down inside you are not doing anything with them.”**

Ok, that probably didn't hurt too bad, did it?

See, I kind of cheated a little...let me explain...

A lawyer never asks a question, unless he knows the answer....simply put...I knew the answer already...and of course it is a **Big-Big YES!**

I have to tell you, that no matter how well your business is doing right now, so-so, good, or great, you know you're probably leaving a ton of business and profits on the table...

I mean, can you imagine for just a second, how much more income you could have stuffed into your personal bank account this month (or last) if you had managed to stay in front of your senior prospects and clients, so that they turn to you when they were ready to get a reverse mortgage, instead of your competitors?

And not only that, don't you wish you had so many new clients coming in the door that you could pick and choose just who you wanted to work with and turn away the rest or be in a position to wait until they were ready.

Yes, you better believe it! I know others who are sitting on huge lists of senior names....and they're doing nothing to market to them or bring them to closing.

Crazy and unbelievable, right?

Sure, Right!

Yet, I've talked to literally hundreds of reverse mortgage professionals who have literally 'confessed' to me, that if they could just figure out how to follow up more consistently with their senior prospects and clients, they would have much more profitable and dependable businesses...most are looking for an easy solution!

You see, they all know deep down inside, that effective follow-up is the key to turning more senior prospects into paying senior clients,

and turning good clients into '**GREAT**' clients who will refer you business over and over.

**The key is simple. Will you need to be there when your senior client is ready? Or if not, get ready, because your competition is going to get your business.**

**But, making the most of your client List (data base), is not rocket science.** It's getting easier, faster, and requires less effort on your part than you might think....if and only if you knew the '**key**'. You see, "**Success starts with you!**"

But, to be successful, it must become a habit. It must start today and be repeated every day. This is even more true when it comes to following up with your senior prospects and clients than with practically anything else in your business.

Say, wouldn't it be great to know you'd never-ever have to stress about whether you'd reach your loan closing goals each month? No more rushing out to plug the dike, hoping to save the day, then finding out 30 days later you're back to square one. Wouldn't it be great to no longer pull your hair, bite your nails in front of your spreadsheet, trying and hoping the numbers might work; and may no more lying awake at night staring into the dark, trying not to give into that tight knot of tension in your stomach, 'hoping' 'praying' 'wishing' for everything to somehow be OK, when you wake up?

Can you imagine not having to worry about making your payroll or paying your monthly bills or your own mortgage? Wouldn't it be incredible to know you have new leads and prospects coming in, day – in, day – out, as regular as clockwork and as dependable as the tides?

Does this sound too good to be true?

You bet...but here's the truth...

It's not fantasy or fiction. It can really be yours...All you have to do is reach out now and take it, because....

"In the next few pages I am going to give you the **Six Foolproof Secrets to Follow –up Success, PLUS a simplified, NO BRAINER 14 step Follow up Campaign** you can take, swipe, steal and use to effortlessly triple the number of senior clients you're getting from your existing leads."

And guess what, that's not all...because if you keep reading, I'm going to reveal my **'insider secrets'** and strategies you can use to double your closing from those clients and proven million-dollar secrets you can use to easily turn one time clients into raving fans who keep kicking at your door to push handfuls of cash into your hands, month after month, year after year.

**So here's the...**

### **"Six Foolproof Secrets to Follow Up Success!"**

Here's the bottom line: if you apply these secrets to your marketing/reverse mortgage business, you will increase your number of closed reverse deals well above the exact same batch of leads you'd be spending long hours of darkness worrying yourself and dreaming they might call you later.

It seems like an outrageous claim, I know...but let me be even more outrageous...

**"Not only will you vastly have more closed deals from your Senior Leads, but you will do it in less time, your job satisfaction will be greater because now you'll be selling your reverse mortgages from a position of trust and respected authority."**

Here's what I mean, whenever you come into someone's life, you have a choice: you can be a **'welcome guest'** or **'unwanted pest.'** So, we know which one makes your senior likes, right?

So, if you follow these easy steps you can do just that. You can literally change your sales and marketing from a anvil tied to your ankle into having and owning the keys to the US mint!

So, you're wondering, where do I start?

**Easy, always start at the beginning.**

Have you ever heard anyone say that the BIG money is NOT in selling products or services....it's in the learning how to MARKET your products or services like a ninja?

Well, I'm here to tell you its true!

So, if you are ready to explode your profits, you've got to develop a **'Marketing Never Give Up Instinct.'**

### **Secret #1: The Real Definition of "Successful Marketing"**

There are three and only three factors that have an iron grip on the profits of any marketing effort.

The smartest marketing minds on earth have boiled these three factors in to a simple and power full Formula:

### **"The Right Message...To the Right Market...At the Right Time!"**

Most of us miss at least one or two, and some all three. As a result, many have very ineffective marketing results. Heck, just miss one of them and you're looking at the wrong end of a marketing disaster just waiting....as if, one leg was chopped off a three legged stool!

Take one leg away and you're on your kisser, flat on the floor, right?

Right...

Many businesses spend a lot of money on image, with no hint of seeing if they get a direct response at all. For most of us, spending money on image is costly and expensive.

Not making use of the three marketing success strategies and having little or not direct response offers, can cost you thousands or maybe millions in lost sales every year!

You're probably thinking, how can I fix this?:

1. Never waste money on image advertising or:
  - Work on branding after you become profitable
  - In reverse mortgage business branding is all about you and your relationship with your senior client.

- Test simple, inexpensive direct marketing offers, including FREE reports, topics, samples, promotional give always with emotional copy to find the message that match the interest of your senior market.
- Concentrate your efforts on the most successful marketing offers, and use several steps, Direct Mail/phone/Email/Voice Broadcast/Postcards/Seminars.
- Follow-up for maximize results! It's critical that you follow-up with your leads repeatedly. You must be persistent and resilient to earn your seniors business.

**Bottom line, Secret #1: Send the right message, to the right market, at the right time.**

Now, there are still some of you who are computer shy. **Here are a few words of WARNING!** If you don't have a computerized System in place now, you are going to waste a lot of leads and a lot of man hours doing tedious, manual labor in your follow up.

### **Secret #2: "Cherry Picking" and the three types of Reverse Leads:**

Here's the deal. Every time you run any Reverse marketing campaign, the senior leads you get can be broken down and divided into three categories:

1. Leads that are ready NOW (Hot)
2. Leads not ready NOW, but will be ready Soon (Warm Leads--these leads are the critical to your Success) and
3. Leads that may never be ready (Cold or bad leads that lead nowhere)

Here's the problem.....

**"You can't divide your Senior leads into categories, because you have no way to know which is which."**

So, you or your assistant calls every lead once or twice and the you spend some time with the leads you know are going to close.

Now, every smart originator who works on commissions does this---because they always go for the low hanging fruit!

I call this “**Cherry Picking!**” Cherry picking is natural in the Reverse mortgage business because:

- A. Its hard to tell the warm leads and bad leads until you reach them.
- B. If you DO reach the lead and the timing isn't just right, you don't have the time and sometimes the patience to constantly hang in there and follow-up consistently on the lead.

Understand, there is nothing wrong with spending your time with HOT leads. In fact, that's exactly what you **should** do. However, the problem with cherry picking is that most of us have a tendency to **neglect all those WARM Leads!**

Of course, every loan originator says they are going to follow-up with these other leads, “one of these days,” but the fact is, those days never come and you don't do it.

Or, if you really do follow-up, you don't do it systematically, because, you start to think it's a pain in the neck. Or life gets in way and we lose our focus.

So, instead of the tedious follow-up, loan originators usually will wait for a new batch of senior leads to come in. But, in the meantime, the warm leads from the last batch are starting to get cold and soon lose their tasty appeal, so they are soon forgotten. Simply put, the old leads begin to slip through the cracks.

Now, I see the light bulb is beginning to glow. You now are to starting to realize you need a system to follow-up with these warm senior leads. You need something or you need someone or maybe you need both, to help you with your follow up, so the process becomes like a well oiled machine and on time. You need to be like the energizer bunny...keep going, going, going!

Over the past years, you've probably tried a number of different approaches trying to follow up or 're-market' to your leads. If you got lucky, you found an occasional needle in the haystack.

BUT.....

**"You can do so much better!"**

Your follow-up doesn't have to be hit and miss.

There's a new way to effortlessly manage the whole process for you.

And, you can be sure it will help you get more out of your leads than what you're doing right now!

Do me a favor, ask yourself this...**"How much would it be worth to you and your business to get just a couple more closed loans from your existing senior leads and clients each and every month?"**

Your Answer Average Origination Gross \$\_\_\_\_\_ X 2=\$\_\_\_\_\_

Now take that number \$\_\_\_\_\_ X 12 = \$\_\_\_\_\_.

**So, to summarize Secret #2:** Its OK to Cherry Pick, but don't forget there is more fruit to pick, if you don't give up.

### **Secret #3: Timing is Everything!**

You'll notice that Secret #3 is closely associated with Secret #1 (the right message, to the right market, at the right time).

Most people tinker around and change their message and their target market and they usually end up with something that works pretty well. But, they forget how critical timing is in the total mix.

Yes, most originators forget the simple truth:

**"Seniors will do a Reverse mortgage when They are ready to do it, not when you are ready for them to do it"**

And this means...by definition....**you have to be in front of your senior prospects when they are ready !**

In case you're not listening....this means you have to Follow-up religiously and **never, ever, give up!**

Because if you don't follow-up...someone else (your competition) will land the business.

Guess what? That someone else who lands the business will be your competitor who either:

- A. Followed up religiously (most likely)
- B. Got lucky enough to cross paths with your prospect at the right time.

You don't want to leave your reverse mortgage business up to chance, not unless you like being poor.

No one wants to be poor! But there is one thing you can control in this situation—yes, staying in front of your senior prospect---and this is probably the single biggest challenge you have in your business.

I often talk to correspondents and originators across the country and they tell me, they know they should stay in touch, follow up and 'be there' for their senior clients when they are ready—but they just can't seem to get a system in place to do that.

**The fact is “follow-up” can be gut wrenching, time consuming and labor intensive task that is almost impossible for the human mind to keep straight, especially in the Reverse mortgage business, because it takes a lot of leads and prospects to keep your pipeline flowing.**

So, reverse mortgage professionals everywhere have a mountain of half baked systems, spreadsheets, tickler files, fancy schedulers, scraps of paper, and who know what else, to help them with this all important function of their business. **Wow, unreal!**

Can you believe it...? I mean, its kind like being wheeled into an operating room for a quadruple bypass and there stands the surgeon and his team ready to go to work on you with there carpenter tools....that's got to scare the dickens out of you and fill you with tremendous confidence.

Unfortunately, many reverse mortgage folks follow up like this and....most of times poor systems lead to nightmares and very poor success!

This leads to the following result; many of us have huge piles of money left on the table every month and continue to throw good money after bad on leads, only to let a good majority of them go to waste because the 'timing' wasn't right for those senior folks. Wow....I tell you, there's a huge business opportunity for you out there in cultivating 'unconverted leads' from these people, just waiting for you!

So, hey, if you happen to find yourself falling into these traps, you're not alone! According, to industry publications, over 99% of small businesses do not consistently and regularly follow-up with their prospects and clients.

I know you are saying, **"Give me some good news."**

Here it is: you can easily cure this problem... and when you do, you'll see a massive jump in your **profits** and your **life**.

**So, Secret #3 is to make 'timing' work for you, not against you.**

#### **[Secret #4: Transform your sales work from outbound 'Hunting' to inbound 'Harvesting.'](#)**

This secret is critical to your success because if followed, it puts you in a position to land your senior clients quickly. It can shorten the conversion cycle, increase your ability to handle more deals/leads/prospects and improve your loan closing ratio because you spend more time talking to your most highly qualified senior leads.

Think about it!

Going out "Hunting" for business is about as easy and sometimes rewarding as carting you own refrigerator home.

**"Sadly, it's not just the pain and effort of doing the heavy lifting, either."**

Oh no...because there is some pretty subtle innuendos here at work.

You see, when you're in the 'Hunting' mode, you're dialing for dollars; you can feel the resistance at every turn; rejection is quite common; you get compared against every competitor; you become just another salesman; and you can waste tons of time working with Senior prospects who simply aren't ready, nor are they pre-disposed to work with you!

Sounds about as much fun as having a root canal, without any anesthesia?

Here comes the good news! When you're in the **'Harvesting'** mode, you're working smarter. You're like the fisherman with the irresistible bait. You're drawing in your prospects to you...

Now you are spending time going out taking applications, closing deals, on the phone with the senior prospects or maybe out on the golf course, because you know your prospects are going to call you when they are ready to move forward with their reverse. You are harvesting and building solid relationships. When you call, they are no longer talking to a stranger, your senior knows who you are and recognizes you voice and connects.

So, here's the **BIG** question....**How can you spend more time working with the hot leads and less time....even no time with the cold leads?**

Is it possible to actually make the shift from hunting to **'Harvesting?'**

To understand how to do this, you really need to know about a fundamental business problem of nearly every company in the world.

**The problem is this: How does an originator balance its marketing and sales efforts?**

But in between 'getting the lead' and 'closing the sale' there's a huge gap.

If you close the gap, you'll make the shift from 'hunting' mode to the **'Harvesting mode'**...and you will see your profits and originations skyrocket.

But in order to make the shift, you need to recognize several things:

- A. Your marketing job does not end when the senior lead is acquired;
- B. Your job as an originator does not begin and end with a 'heat check' phone call to reach each lead' and most importantly;
- C. You have to take control and be in charge of 'warming the senior leads' that aren't hot right now but will be hot down the road.

In plain and simple words....

**"If you want to really explode your reverse mortgage profits, the functions of both marketing and sales must come together."**

Otherwise your marketing efforts will be flushing money down the toilet on leads that aren't hot right now and never will happen.

Now I believe you are starting to understand the job ahead of you, let me give you **five (5) tips on how you can make the shift:**

1. Send relevant, valuable information to every senior prospect regularly, relentlessly and frequently. You need to do this until they buy, die, or ask you the reason why!
2. Communicate with your senior prospects in an efficient manner, aside from the normal, time-consuming, one on one method.
3. Make a record of every call, every touch point, communication between you and your senior client and keep it in an organized fashion for easy reference.
4. Equip yourself and your originators with an arsenal of specific information you can readily send to your senior prospects on demand.
5. Keep track of your progress on each senior lead by disposition using your sales tracking tools, so you always know the status of each lead and where it stands.

As you read, I know you are thinking and wondering, please tell me some good news...and the good news is here...and all you have to

do is make use technology, yes, an automated System and its can be done ***effortlessly, all the while keeping you on track and organized.***

Whether you're one person or part large corporation, it makes no difference. Results are what matters and no one is going to pay your bills but you, so you need to find out how you can start working smarter!!

And...

**“When you make this shift, you are going to absolutely be amazed at your results!”**

Soon you'll start to enjoy your work more, you won't dread making outbound calls , and you'll soon have more freedom...all because your prospect will warm to you, will call YOU when they are ready to move forward with their reverse.

This can happen to you every day!

The bottom line is so simple...you'll close more loans, make more income, and do it all in less time...and you'll throw out the grunt work.

**So, Secret #4: Make the shift from outbound 'hunting' to inbound 'HARVESTING.'**

**[Secret #5: You must have a Living, Breathing, Senior Client database...](#)**

Sounds silly I know. If you're like most small mortgage companies, you want to build an origination business that doesn't rely solely on outside marketing efforts. You want to maximize your referrals and your repeat business, so that you don't have to spend your time chasing down and convincing people to do a reverse mortgage with you. This should be your ultimate goal.

I have the opportunity to speak to originators and correspondents every day who dream of having the ultimate senior client base that does nothing but provide them with lots of repeat and referral clients, again, this should be your ultimate goal.

But when I talk to them about what they're doing to make that dream of reality, too often I get answers like this:

*"Sam, I'm so busy, I don't have time to really do what you say I should be doing."*

*"Sam, I already have a good base of customers I work and eventually I'll get the business."*

*"Sam, I need a good data base, but I don't know where to start."*

*"Sam, I really can't afford to do that."*

When I hear the excuses, I think to myself, "Uh-Oh!!" Why? Because this is a very passive mindset and this type of thinking can cost you thousands, maybe millions of dollars over the course of your business career!

The Truth is sometimes hard to hear! But facts are facts... Here's what happens as the months go by...

And no matter how great your service was, your senior clients are just like you and me, they're busily living their lives...

**Odds are, in a very short time, they will not remember you.**

And guess what, they definitely won't mention your name at the next family barbecue, senior center, or outing where cousin Fred starts talking about not having enough money to live on or complains about the high cost of gas or medical care or his 401K plan evaporated!

Don't get me wrong, I'm not saying that good service won't help you get a referral here and there? But, good service today is a given and you need to do more or you could soon be in another profession.

What I am trying to say is that if you really want a strong senior client base that refers clients to you daily, that is the backbone of your reverse business, you must actively, systematically, and methodically, build and constantly massage, even after the reverse mortgage is closed.

**"This is where Secret #5 comes in: You Must Have A Living, Breathing Senior Database and Lots of Them!"**

Your senior client database is much more than a prospect or a list of customer records in a spreadsheet or closed file cabinet.

Your senior clients are more than your Outlook files or your contact management program.

Your senior clients are the very being and lifeblood of your reverse mortgage business. Your senior clients are worth more than any amount of stock, real estate or intellectual property – your senior client base is everything you should and can know about each and every senior client, every single senior prospect and every customer or contact person, all combined into one, easy to use automated computerized system.

**Think of it this way....**

**“Without your senior client database, you don’t have a Senior client. What you have is a client burial field!”**

However, on the other hand, a living, breathing senior client database gives you a powerful asset you can use to grow your business from year to year and years to follow. A good senior database is truly worth Millions...Literally...!!!

What do I mean when I say you need a ***“living, breathing senior client database?”***

Well, I mean you must actively build your customer database every day, every week, and every month! Everything needs to be stored and be accessible to sort, slice, and dice it however you wish, into meaningful groups and....

**“You need the flexibility to sort through the database so that at a moment’s notice you can pull up your senior prospects who might bring you more business.”**

For example, you might want to pull all senior prospects who had a shortfall last year, because of age or maybe a shortfall for property values, or a perhaps a change in property values this year now make your Senior client eligible to do a reverse. What about a new program that targets Jumbos or a new Fixed program just hits the street and you have several clients hung up on a fixed rate versus a variable rate.

Remember you constantly work with senior clients all year who did not move forward for one reason or another. You need to make sure you configure and categorize your data base in a way that allows you instant access to quickly gather and respond now to take a Senior client off the fence and into your bank.

And when you combine a solid senior client database with the power of relentless and persistence sequential follow-up, you now have the ability to land "loads" of new business in a very short predictive manner.

You can *effortlessly* run a customer loyalty campaign and keep your name in front of your senior clients...and thereby, keeping referral business and repeat clients coming your way. And THAT means, a satisfied client and more income in your pocket, right?

Remember when you go to the bank to make a deposit, they don't ask you, is this deposit from a new client or an old client? What matters is what goes in your bank.

In summary, you can cultivate a relationship with your senior clients and senior prospects to cause them to want to bring you business when they (or their friends and family) are looking for your product or your service.

This is the heart and soul of the benefits that come when you have a solid, well organized, database:

- You are organized. You know what to do, who to do it for and when to do it.
- You come across to your senior clients as being professional because you do what you say you'll do, you never ever forget.
- All the important client information is store in one place for easy reference and use.
- Your service delivered is superior because all customer data is in one place.
- Your past customers remember you. They keep coming back and keep referring their friends and family to you.
- And best of all **you now have a money tree** you can shake on demand when you want more business.

Now, you are probably thinking this can be pain in the neck to build a customer data base.

But actually, it is very easy and simple...

In fact, most database vendors can help you import all of the important information right into your senior client files, so you don't have to spend all day typing it into the computer.

Then, after you've got the old or current data base into your computer, you daily start to enter new information about your current senior contacts and senior prospects.

Once completed, you will have a base of senior clients that you can 'talk to' to generate interest in your particular reverse product. You can do marketing blasts, loyalty campaigns, special announcements, newsletters, courtesy calls, voice mail calls with events, and much more. The possibilities are limited only to your imagination!

When you put this important marketing secret into action, your senior client database will become your #1 ASSET, bringing you added business for weeks, months, and years into the future.

**So, Secret #5 is: You must have a Living, Breathing Senior Database.**

### **Secret #6: Education, Repetition and Variety**

**Most reverse originators market their reverse products and services like this:**

- Step 1.** Buy a bunch of leads or generate leads with a mailer or other campaign.
- Step 2.** Next, sort out the leads.
- Step 3.** Originator next calls the leads to find out who the hot ones and who are ready to go now

- Step 4.** Originator works with the hot leads to close a quick and easy deal.
- Step 5.** The Originator throws away, postpones, neglects or forgets to call back the leads that aren't hot
- Step 6.** The process gets repeated over and over.

Don't feel too bad, just about everyone on earth does the same thing.

And it's not bad....until you realize how much money you are leaving on the table. The fact is, for deals you close using this common practice, there's another 2-3 or more, that you could close!

That's a pretty powerful claim! So, how do you do that? Well, that's what **Secret #6** is all about.

### **“How to Properly follow-up using education, repetition and variety!”**

You see, over 99% of small businesses don't properly follow-up. Why? Because they don't have a system, they don't have time, they don't recognize how valuable it is, and the truth is, many don't know how to follow-up!

That's okay.....because ->

You can't be expected to know how if you haven't been told!

First off, you need to understand that a couple of random follow-up phone calls to each senior lead prospect will definitely help you close more deals, but it's not proper follow-up and it's not going to produce the big numbers.

Instead, your follow-up must take a multi-tiered approach using the following three elements:

**1. Education.** Your follow-ups must inform your senior prospects. You need to provide valuable information. You need to communicate to your prospect that you are on their side and deserve to be *Trusted*. Partly, you can do this by providing insightful and beneficial information. The reverse mortgage sales process can be confusing and intimidating for your Senior clients. **They want to trust you.** Give them the information they want and you'll earn that trust.

**2. Repetition.** It's a proven fact that we have to hear the same thing over and over before it really sinks in. Marketing to your Senior clients is no different. You know your products and service like the back of your hand...but your senior clients don't "get it" the first time they hear your message. Don't make the mistake of thinking that if a senior prospect heard your explanation once, they fully understood. There's a big chance they didn't. Tell them again and again. Remember the word 'mortgage' is pretty scary if you are 62 or older.

4. **Variety.** This doesn't mean you should vary your message! You need to become a disciple and keep telling your message over and over, but your follow-up delivery *needs Variety.*

**To maximize your efforts, you must use multi-tiered steps in your follow up that incorporate several sequences of direct mail, phone, voice broadcast, and other media!**

Some of your prospects will respond to your call, others to emails, letters, postcards or voice broadcast. When you contact prospects **using multiple methods, there is a *serious power*** that takes over the process.

**"So, bottom line, proper follow-up requires you to repeatedly contact your senior lead or prospect, provide valuable information via direct mail, phone, email, or voice broadcast or other messages!"**

Most originators don't understand just how critical Secret #6 really is. Don't let that be you. Give yourself a moment to let Secret #6 sink into your brain: education, repetition, and variety are VITAL to proper follow-up success.

Now, take time to consider everything [I've](#) talked about regarding the [\*\*Six Foolproof Secrets to Follow-up Success\*\*](#) into a guaranteed and concrete follow-up plan?

Then keep reading.....

## **“YOUR Infallible 14 step plan to Mastering Follow-UP”**

The biggest problem with any kind of marketing today is...getting leads and qualifying those leads. See, it's NOT just about having a large number of names...a list of Seniors ain't going to buy a whole lot bonds that mature in 30 years.

Right...

So you need to get your seniors to put their hand up and say **“Yes, That's me? I want to learn more about Reverse mortgages and how it can benefit me and my situation!”**

And guess what? When they do, you send them....

“The FREE Report: The vital tool in your marketing toolkit!”

Look, like I said this is NOT rocket science.

Your lead generation marketing must offer some form of important information (be that a Free report, video, audio, brochure) that will interest your Senior lead or prospect. Once received, the follow-up must continue.

Simple, isn't it!

So keeping in mind the [\*\*Six Foolproof Secrets to Follow-up to Success\*\*](#), I'm now going to show you how a great campaign might work. And This campaign WILL Bring Home the bacon. **I promise IF and ONLY IF, you actually DO it!**

## **“Sam Collins 14 Step “Reverse Mortgage Follow-Up Sequence”**

- 1. Senior Prospect requests information (report/video) from your web site, direct mail piece, referral, or other media, (you capture the lead prospects name, address, phone, property info, date of birth).**

2. **Immediately:** you call the prospect and thank them for contacting you.
3. **Same day:** Simultaneously, you are then sending them an email with a similar message.
4. **Same day:** You are sending (or Suzy in the office) them a letter, (fulfillment) again reiterating the message and including your FREE report or offer.
5. **Day 3:** Send Email telling client to "Watch Your Mailbox for Your Free Report"
6. **Day 5:** Send a "Watch Your Mailbox" voice broadcast to "Watch your Mailbox", from you reminding them the free report will be arriving.
7. **Day 7:** Follow-up (postcard). Ask if they have read the Free report and whether they have any questions.
8. **Day 10:** Follow-up testimonial postcard arrives. (helps to overcome common objectives)
9. **Day 14:** Second notice letter Arrives. This includes another Free report (or audio). You might want to include a special bonus if they set an immediate appointment.
10. **Day 23:** Testimonial letter arrives. This helps overcome another common objection and reminds them they that is OK to proceed and builds Trust.
11. **Day 28:** Timing. Now may not be the time letter.
12. **Day 33:** Phone call, Live. Follow up to see why we haven't heard from them.
13. **Day 40:** "Why didn't you respond" Survey sent.
14. **Day 45:** Plus additional monthly follow up, (I send my Reverse Times Newsletter) until they tell you not too. We send this forever.

**"Ok, this is pretty easy...what's the catch and why don't more mortgage originators do it?"**

**Simple, all it takes is a bit of work and a bit of discipline.**

Unless, you're using some of kind of automated system, can you imagine having to do this manually.

And that means, spreadsheets, calendars, scraps of paper... and a lot of memory jogging and running around...

Here, let me explain....

**Let's say this is the response for week #1, (i.e. the number of seniors who responded to your offer)**

Day 1 you get 10 responses

Day 2 you got 6 responses

Day 3 you get 7 responses

Day 4 you get 1 response

Day 5 you get 12 responses

Day 6 you get 9 responses

Day 7 you get 15 responses

**So here's what you have to keep track of day by day:**

**Day 1:** Phone Call, Send letter with reports and emails to Day 1 responders

**Day 2:** Phone Call, Send letter with report and emails to Day 2 responders.

**Day 3.** Phone Call, Send letter with report, emails to Day 3 responders, plus send email to Day 1 responders "Watch for your FREE report".

**Day 4:** Phone Call, Send letter with report and email confirmation to Day 4 responders, plus “Watch you Mailbox” voice broadcast to Day 2 responders.

**Day 5:** Phone Call, send letter with report and email confirmation to Day 5 responders, plus “ Watch your mailbox”, to day 3 responders, plus “watch your mailbox’ **voice broadcasts to Day 1 responders.**

**Day 6:** Phone Call, send letter with reports and email confirmation to Day 6 responders, plus “Watch your mailbox”  
Email to Day 2 responders, plus “watch your mailbox” voice broadcast to day 3 responders.

**Day 7:** Phone Call, send letter with reports and email confirmation to Day 7 responders, plus “Watch your mailbox” email to Day 3 responders, plus, “Watch your mailbox” voice broadcast day 4 responders, plus, follow up postcard to Day 1 responders.

**“Does this sound a little complicated, yet? Well, we’re just getting started!”**

**Because if you think it’s to complicated just to read through what you gotta do, imagine actually trying to DO IT!”**

Now imagine what happens when you are 60 days into this process and have tens or hundreds more senior clients you are trying to follow-up with!

And to top it off, your assistant comes down with the flu and all of a sudden your up to your armpits in stuff and you don’t have a clue how to handle or manage it.

I don’t know about you, but for me the word “Nightmare” springs to my mind, quickly followed by “Heart Attack.”

Then imagine what happens next, when you add in the “New Customer Relationship-Building System” and the “Customer Referral Generating System” and the “Customer Thank You System”...

Let’s say it doesn’t get any easier!

**“Don’t get me wrong, my Sam Collins 14 – Step Follow-up Sequence will work.” It is simple, straightforward and**

**effective. There are originators and correspondents out there right now using it and being successful every day!**

Quite honestly, it's a pain to manage everything going on once your client list starts to grow. Without a system your marketing gets more and more complicated.

**However, here is something I haven't told you...**

**"Once you start marketing this way, you're gonna be happy and understand, it's easy to become better at what you do!"**

Quite simply, you're going to love the way you start to convert and close more loan—deals you thought were dead—and soon without the heavy lifting on your part. Converting deals with a lot less stress—you'll be falling all over yourself to build an ever bigger, more powerful marketing campaigns to grow your origination business.

Seriously, I mean it. Once you realize the more you poke and prod your seniors, the more profits you will realize. With your system the more you use it, the better it will work. It will be like a relaxing evening with your favorite person.

And this is when you will find that a manual system becomes really impossible and unwieldy.

**"Now, there is an easy solution to this, too!"**

I have already designed specific multi-step senior marketing campaigns specifically geared toward Senior clients and the reverse mortgage business...**Done for You now!**

I've tried the other systems, you name them. You know who they are, like Act! Or Goldmine, they are nice, but not enough to get you where you want to be, unless you're OK with that same old same old.

Well, yeah, I can understand that...because the first Europeans to cast their eyes upon a giraffe and explain "there ain't NO such animal!" Well, you have to compare my system. I mean all mammals are not the same?

Best of all, my system wakes up in the morning with the eggs, bacon, toast, served up with choice of juice served up ready to go.

Best of all, my system does it all for you Automatically, and simply. I have it all set up for you, content, campaigns and lots more. Even my hound dog could use it!

Here's the deal...Instead of doing the same ole thing, don't you think it's time to invest in yourself and your business and become the "Master" of follow up...and we can help you do it!

You know, I can't tell you enough in this report of what I written to help you with your reverse mortgage business and what my system can do for you, but you gotta see it for yourself.

**I look forward to seeing you become the "Reverse Master" of Follow-UP and Master your Way to the Top in your Marketplace.**

**To Your Success,**

**Sam Collins**