

# The Simple Offer Worksheet

Member Name: \_\_\_\_\_ Acct # \_\_\_\_\_ Date: \_\_\_\_\_

## Mortgage Indicators: **Identify a Need**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

What kind of mortgage borrower might this member be? \_\_\_\_\_

What can you say to **start the conversation**? \_\_\_\_\_

\_\_\_\_\_

What questions need to be asked to **learn more**?

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

How can this help the member: **Feature, Benefit, Advantage**

**F:** \_\_\_\_\_

**B:** \_\_\_\_\_

**A:** \_\_\_\_\_

Help the member commit to meet with a mortgage loan officer/expert.

\_\_\_\_\_

What day would work best for you? \_\_\_\_\_

What is the best timeframe to reach you? (Between) \_\_\_\_\_

What is the best number to reach you at? \_\_\_\_\_

Signature of Completion: \_\_\_\_\_

# \_\_\_\_\_ : Product Profile

(Product or Service Name)

## Product Description:

_____
_____
_____
_____

## Features, Benefits, and Advantage:

F: _____	B: _____
A: _____	

F: _____	B: _____
A: _____	

F: _____	B: _____
A: _____	

F: _____	B: _____
A: _____	

## Product Indicators:

• _____	• _____
• _____	• _____
• _____	• _____

## Product Qualifiers:

• _____	• _____
• _____	• _____
• _____	• _____