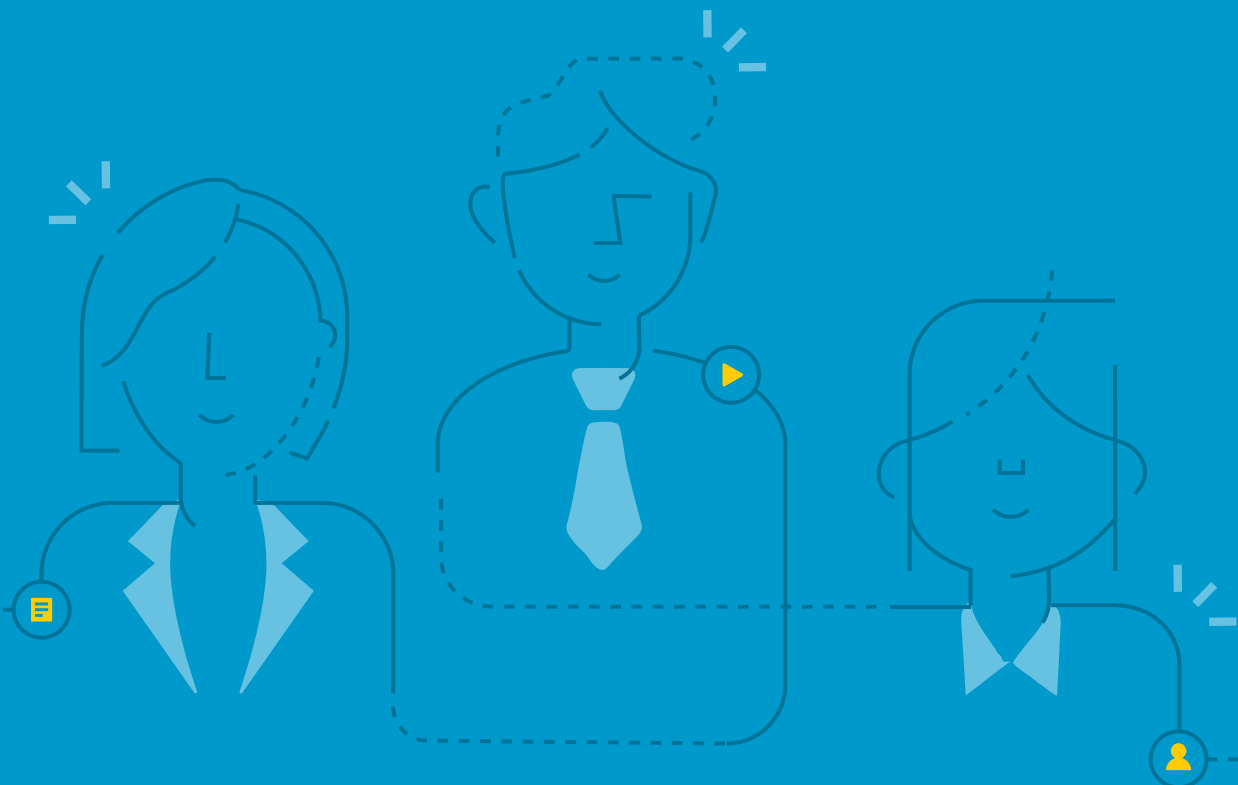




YOUR MORTGAGE **ACTION PLAN**

Plan for your first 4 weeks with **BombBomb**.

What to say, when to send, and how to stay on track to achieve your desired outcomes through simple video messages.



PLAN YOUR FIRST 4 WEEKS

Top Desired Outcomes

Many of the messages you need to send to prospects and clients to reach your sales goals are best done face-to-face. Here are the best touches organized by desired outcome, including how often and how many to send!

INCREASE APPOINTMENTS AND CONVERSIONS

Initial lead response Frequency: as needed

Responsive lead follow-up Frequency: as needed daily weekly Quantity: 1 2 3 4

Non-responsive lead follow-up Frequency: as needed daily weekly Quantity: 1 2 3 4

Appointment confirmation Frequency: as needed

Appointment follow-up Frequency: as needed

Referral Lead response Frequency: as needed

INCREASE REPEAT AND REFERRAL BUSINESS

Birthdays Frequency: as needed

Thank you for the referral Frequency: as needed

Anniversaries Frequency: as needed

Social media observation Frequency: as needed daily weekly Quantity: 1 2 3 4

Checking in and sharing gratitude Frequency: as needed daily weekly Quantity: 1 2 3 4

Video testimonial request Frequency: as needed daily weekly Quantity: 1 2 3 4

SAVE TIME AND IMPROVE EFFICIENCY

Appointment confirmation (pre-recorded)

Birthday (pre-recorded)

Lead response (pre-recorded, Snippet, Zillow) Quantity: 1 2 3 4

Explaining complex material Frequency: as needed daily weekly Quantity: 1 2 3 4

Frequently asked question(s) (pre recorded) Frequency: as needed daily weekly Quantity: 1 2 3 4

PLAN YOUR FIRST 4 WEEKS

Plan Accountability

You're working to build a new habit - a habit with a huge payoff. Accountability is key to forming this habit. Track your actions and reach out to your BombBomb rep to stay on track.

VIDEOS PER WEEK:

ACCOUNTABILITY CALENDAR

Example

WEEK

S

M

T

W

T

F

S

Total per week

7

1

3

2

1

WEEK 1

S

M

T

W

T

F

S

Total per week

WEEK 2

S

M

T

W

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F

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Total per week

WEEK 3

S

M

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W

T

F

S

Total per week

WEEK 4

S

M

T

W

T

F

S

Total per week

TOP DESIRED OUTCOMES / RELATED PURPOSES

Increase Appointments + Conversions

You communicate, connect, and convert most effectively in person, but you can't always get there quickly with new leads - and sometimes you can't get there at all. Get face-to-face immediately and increase reply rates by sending simple videos. BombBomb's tracking and alerts help you know exactly who to follow up with and when.

81%

of BombBomb customers report an increase in replies and responses.

15% say they've doubled or more than doubled their response rate.

87%

of BombBomb customers report an increase in clicks through emails.

More than 25% doubled or more than doubled their click-through rate.

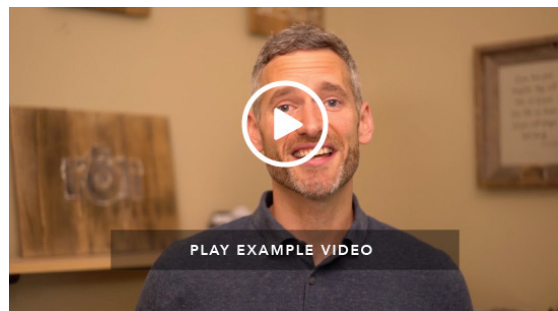
2/3

of BombBomb customers report an increase in lead conversion.

More than 10% doubled or more than doubled their lead conversion rate.

Don't settle for the silent treatment.
Don't waste time with back-and-forth emails, texts, and calls. **Increase engagement and accelerate the sales process with video messages.**

INITIAL LEAD RESPONSE

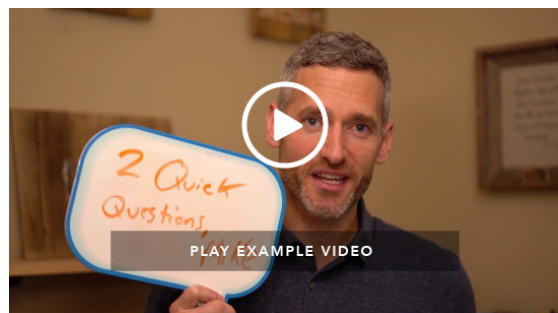


SUGGESTED SCRIPT:



"Hi, (name). I'm (name) with (company name). I wanted to reach out to you with a video and put a face to a name and let you know I'm a real person. I am here to help you. Whether you're looking to buy in the next two months or not for another two years, I have some great information for you and I can help you at any stage in the process. All it's going to take is a quick 3-5 minute phone call. You can call me on the number below, or simply respond to this email and let me know when the best time to connect with you will be. I can't wait to talk to you in person (name) and help you out with your mortgage needs. Hopefully, we get to chat soon."

RESPONSIVE LEAD FOLLOW UP

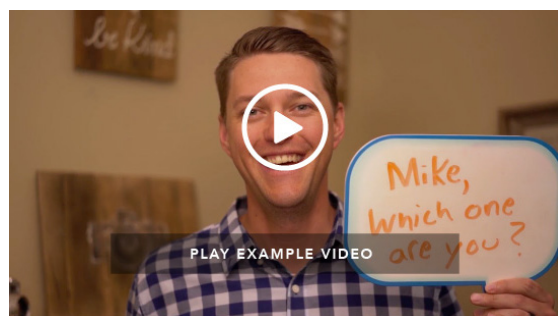


SUGGESTED SCRIPT:



"Hi, (name). It's (name) with (company). I have two quick questions for you in this video. Number one, I know you said you were thinking about moving sometime late summer. I just wanted to make sure that timeline is still accurate because there are some things we can do right now to make sure you're prepared. And number two, I wanted to see if you have any questions for me in the meantime. You can think of me as your consultant, providing you help any step of the way. To respond to this email, hit reply or the 'reply with video' button and send me a video message. I hope you're having a great day (name)."

NON-RESPONSIVE LEAD FOLLOW UP



SUGGESTED SCRIPT:



"Hi, (name). It's (name) with (company name). I've (mention how you reached out) but I haven't heard back from you yet. Which means you probably fall into one of two categories. Either you've already made your purchasing decision and there is really no reason for us to continue communicating, or life has just gotten busy and you haven't had the chance to reach back out. And I completely get it. So I just wanted to follow up one last time to see if we could find some time to connect. I'm excited to learn more about what your needs are, and how we can specifically help you achieve them. You'll find my phone number below, or you can reply back to this email and we can find a time to connect that works best for you. Have a great rest of your day (name) and I look forward to talking soon."

APPOINTMENT CONFIRMATION

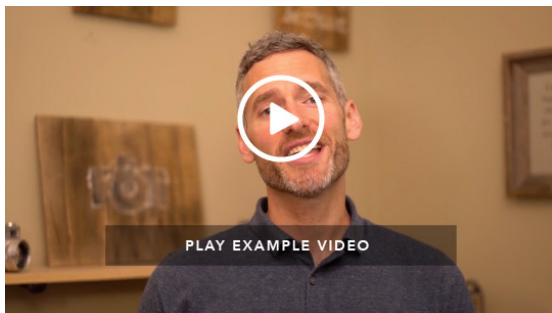


SUGGESTED SCRIPT:



"Hi, (name). (Name) here with (company name). I'm really looking forward to our upcoming appointment on (day) at (time) at (location). (Promise a specific piece of value they'll get at the appointment, that you heard them asking for during scheduling). If you have any questions in the meantime, just reach out! I look forward to seeing you on (day). Have a great rest of your day."

APPOINTMENT FOLLOW-UP

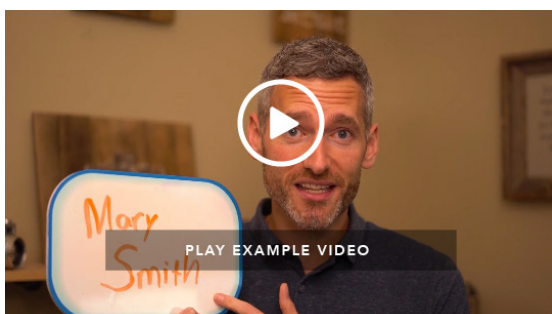


SUGGESTED SCRIPT:



"Hi, (name). Thank you so much for meeting with me. It was a pleasure to get to know you and learn more about you, your interests, and (mention something you learned about them). I know you said you wanted to (their next steps), and that sounds great. What I'll do, is I'll follow up on (day) and I can answer any questions you have then. It was a pleasure meeting you and I can't wait to talk to you soon."

REFERRAL LEAD RESPONSE



SUGGESTED SCRIPT:



"Hi, (name). It's (name) from (company name). (Realtor's name) gave me your contact information. You have impeccable taste in your real estate agent. (Realtor's name) is an amazing agent. He/she is a wealth of knowledge, as I'm sure you know. He/she passed along your info to me. I am here to help you, to guide you through the process, answer any questions you may have. It just takes a 3-5 minute phone call so I can learn more about you. Either call me at the number below or respond to this email and let me know when a great time to connect would be. I can't wait to talk to you soon (name) and help you out with the purchase of your new home."

TOP DESIRED OUTCOMES / RELATED PURPOSES

Increase Repeat + Referral Business

The people you already know and who already know you can provide some of your warmest and best opportunities. All you have to do is stay in touch! Reaching out with video provides a personal and memorable touch that keeps you top of mind.

90%

of BombBomb customers say they stay in touch more effectively.

56%

of BombBomb customers say they generate more referrals.

1/3

of BombBomb customers say they've doubled or more than doubled their ability to stay in touch.

The cost of retention and referral is far lower than the cost of acquisition. And these opportunities tend to start warmer and close faster - **especially with video.**

BIRTHDAYS

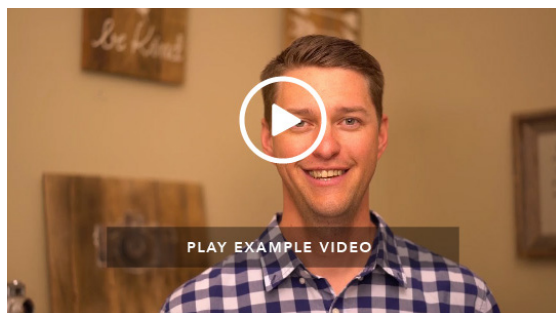


SUGGESTED SCRIPT:



"Happy Birthday, (name). Did you know that on this day, it's not just your birthday but you share it with (notable person)? There are a lot of (smart, successful, fun) people born on this day, including you. I just wanted to reach out and wish you the best birthday. I hope you have a wonderful day celebrating and I look forward to talking to you soon."

THANK YOU FOR THE REFERRAL

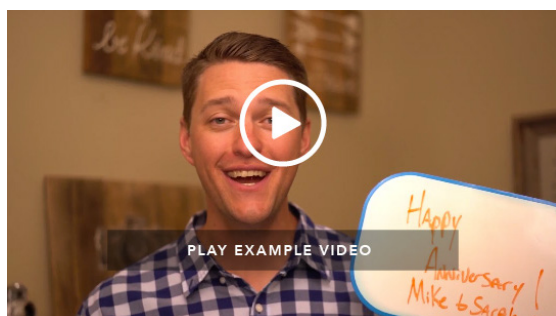


SUGGESTED SCRIPT:



"Hi, (name). I just wanted to reach out and say "thank you." I really appreciate you sending (referral) our way. I've already reached out to her/him and have her/him moving through the process. I wanted to tell you "thank you." Our business wouldn't be growing, and we wouldn't be able to do what we're doing, without amazing people like you that we work with. I'll make sure you stay up to date with where (referral) is at in the process. If you need anything in the meantime, please send me an email or give me a call. Have a great day."

ANNIVERSARY

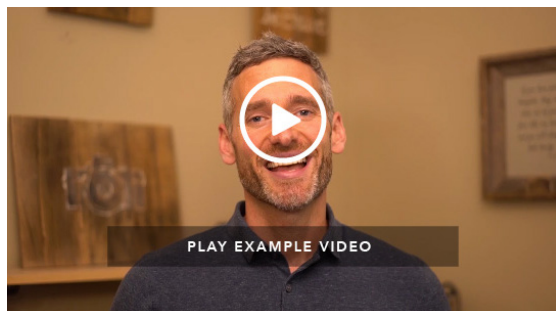


SUGGESTED SCRIPT:



"Happy anniversary (names). You might be wondering, our anniversary of what? Well, you're home (refi or anniversary)! Can you believe it's been (number of years) since we went through the process? The reason why I remember this is because I care about my customers. I love helping you save money. Especially when it's helping you move toward your financial goals. I remember (memory of renovation they wanted to do or another goal). Did you accomplish that? I'd love to hear how you're doing (or see some photos of the renovation). Happy anniversary and thank you for trusting me to take care of your needs. If you know anyone else that might be in that process feel free to send them our way. We'd really appreciate it. I hope you have a great rest of your day and I'll talk to you later."

SOCIAL MEDIA OBSERVATION

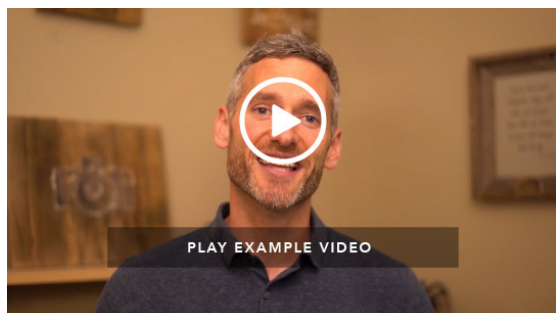


SUGGESTED SCRIPT:



"Hi (names). (Name) here. I was on Facebook and I saw that (observation - vacation, restaurant, family update, etc.). I just wanted to reach out and (ask a question, connect with the experience, or say congratulations). That's it. Just wanted to reach out and also say hi. I look forward to hearing your response."

CHECKING IN AND SHARING GRATITUDE

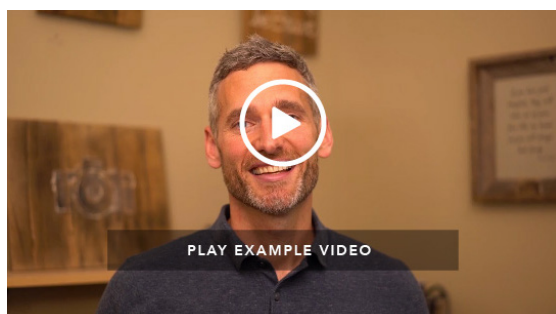


SUGGESTED SCRIPT:



"Hi (names). (Name) here. I woke up this morning and was just feeling a lot of gratitude. I was thinking of you and the relationship we have. Usually, when you start a business relationship with someone you don't expect to become friends with that person and you've become a very good friend. Thank you for being that friend. I love working with you. That's it. I hope you're having a fantastic day and we'll chat soon."

VIDEO TESTIMONIAL REQUEST



SUGGESTED SCRIPT:



"Hi (names). (Name) here. I hope you and your family are doing well. One quick request for you. I wondered if you could click the link below, go online, and give me a quick testimonial. My business is built around happy customers and I would value your testimonial on the website. I have a goal to get (number) testimonials up on the website. I would love if you were one of them. Click five stars if you believe I deserve five stars. If I can ever do anything for you (name) please let me know and hopefully we'll talk soon. Thanks."

TOP DESIRED OUTCOMES / RELATED PURPOSES

Save Time + Improve Efficiency

A common misperception is that video requires more time than typed-out text. Once you're basically comfortable, though, you'll save time by talking instead of typing and you'll communicate much more clearly, cutting down all those back and forth exchanges. With tracking, automations, integrations, and the ability to use your emails, videos, and scripts over and over again, BombBomb gives you serious efficiency gains.

4x

On average, we talk four times faster than we type.

34x

Face-to-face communication is far more successful than typed-out emails.

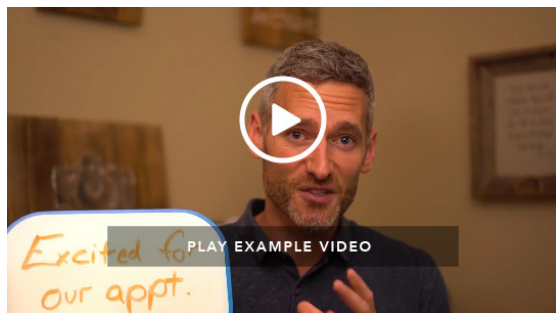
13hr

On average, we spend this much time every week reading and typing out emails.

BombBomb's not just a video platform.

It's a sales acceleration platform. A small investment of time up front delivers significant benefits in the weeks, months, and years ahead.

APPOINTMENT CONFIRMATION

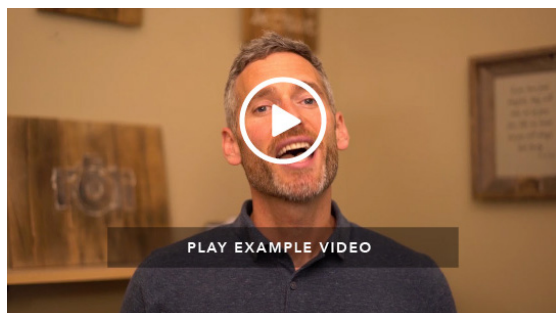


SUGGESTED SCRIPT:



"Hey, it's (name) with (company name). I'm really looking forward to our upcoming appointment. I wanted to reach out and go over three quick things with you. Number one, the date and time are below. I wanted to make sure we're on the same page, so please confirm that is accurate. Number two, if you could prepare your list of questions, needs and wants ahead of time, that will help us make the most of our time. And number three, if you need to reschedule for any reason please just let me know ahead of time. I'm excited to meet you in person and look forward to talking soon."

BIRTHDAY



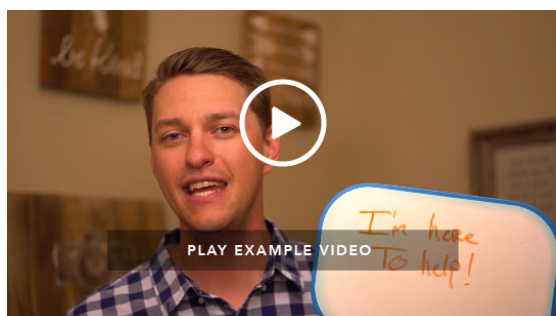
SUGGESTED SCRIPT:



(pretend you're going to sing)

"Happy..." just kidding, I'm not going to sing. I'm an awful singer and you don't want to hear that. But I did want to reach out and wish you a very Happy Birthday. I hope you're having an amazing day so far and doing all the things you love to do. Just wanted to reach out and say, "happy birthday."

LEAD RESPONSE



SUGGESTED SCRIPT:



"Hi. I'm (name) from (company name). I wanted to quickly send you a message and say thank you for reaching out to us. It looks like you're ready to move forward in the mortgage process, and I'm here to help. I understand you might have a lot of questions, and I'm here as your consultant to answer any questions that come up. To do that, we need to have a quick chat so I understand everything going on for you. Do you have 3-5 minutes for a phone call? Just reply to this email or call me, and let me know what time works best for you. Have a great rest of your day, and I look forward to hearing from you soon."

EXPLAINING COMPLEX MATERIAL

 [View Quick Tips](#)



FREQUENTLY ASKED QUESTION(S) (PRE RECORDED)

 [View Quick Tips](#)

