

Personal Loan Inbound Sales Mock Script

Greeting: *"Good [morning/afternoon/evening]. Thank you for calling [Bank Name]. This is [Agent Name]. Are you calling about a personal loan?"*

Need Capture: *"May I have your name?"*

"How much are you looking to borrow, and for what purpose?"

Offer Positioning: *"Based on this, you may qualify for a personal loan with rates starting at [rate] and flexible repayment up to [term]."*

Quick Eligibility Check: *"To proceed, could you confirm your income source and monthly earnings?"*

Next Step: *"I'll email you the application form and required documents now. Once submitted, we'll move quickly."*

Close: *"Thank you for choosing [Bank Name], [Customer Name]. Have a great day."*

Mortgage Loan Inbound Sales Mock Script



Greeting: *"Good [morning/afternoon/evening]. Welcome to [Bank Name]. This is [Agent Name]. Are you calling about a mortgage loan?"*

Quick Identification: *"May I have your name and account number?"*
"Thanks, [Customer Name]."

Need Snapshot: *"What property are you planning to finance?"*
"And approximately how much loan are you looking for?"

Offer Framing: *"We offer both fixed and adjustable-rate mortgages with terms from [X] to [Y] years, and very competitive current rates."*

Quick Eligibility Check: *"To guide you accurately, could you confirm your income and any existing loans?"*

Next Step: *"I'll email you the application and a document checklist. Once we receive them, we can start processing right away."*

Credit Card Inbound Sales Mock Script

Greeting: *"Good [morning/afternoon/evening]. Thank you for calling [Bank Name]. This is [Agent Name]. Are you calling about a credit card?"*

Quick Identification: *"May I have your name and account number?"*
"Thanks, [Customer Name]."

Preference Capture: *"What are you mainly looking for: rewards, cashback, or a low-interest card?"*

Best-Fit Pitch: *"Based on that, our [Card Name] could be a good fit. It offers [key benefit] and comes with [no annual fee / an annual fee of fee]."*

Quick Eligibility Check: *"To proceed, could you share your income and employment details?"*

Next Step (Assumptive): *"I'll send you the online application link now. Once you submit it with the documents, we'll process it quickly."*

Close: *"Thank you for choosing [Bank Name], [Customer Name]. Have a great day."*

Savings Account Inbound Sales Mock Script

Greeting: *"Good [morning/afternoon/evening]. Welcome to [Bank Name]. This is [Agent Name]. Are you calling to open a savings account?"*

Quick Identification: *"May I have your name and account number, if you have one?"*

"Thanks, [Customer Name]."

Preference Capture: *"Are you looking for a regular savings account, or one with higher interest or lower balance requirements?"*

Best-Fit Recommendation: *"Based on that, our [Account Name] offers [key feature], with an interest rate of [rate] and a minimum balance of [amount]."*

Quick Setup Check: *"To get started, I'll need your ID details and the amount you'd like to deposit initially."*

Next Step (Assumptive): *"I'll email you the application form now. Once you return it with the documents, we'll open your account quickly."*

Close: *"Thank you for choosing [Bank Name], [Customer Name]. Feel free to call us if you need any help. Have a great day."*

Insurance Product Inbound Sales Mock Script



Greeting: *"Good [morning/afternoon/evening]. Welcome to [Bank Name]. This is [Agent Name]. Are you calling about insurance options today?"*

Quick Identification: *"May I have your name and account number?"*
"Thanks, [Customer Name]."

Coverage Need Capture: *"Which type of insurance are you exploring—life, health, or property?"*

Best-Fit Positioning: *"Based on that, our [Product Name] offers [key coverage] with premiums starting at [amount]."*

Quote Readiness Check: *"To generate an accurate quote, I'll need a few details about your coverage needs."*

Next Step (Assumptive): *"I'll email you the product details and application form now. Once you review and submit it with the documents, we'll proceed."*

Close: *"Thank you for choosing [Bank Name], [Customer Name]. I'm here if you need any help. Have a great day."*



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