APEX Mortgage Corp. presents

The Art of the Commercial Sales Call

Part 3: Business Owners
Best practices for selling small commercial mortgages to the borrower
Best Practices

- 3 questions you need to ask your borrower
- 3 critical things to discuss with your borrower from the beginning
- 3 techniques for overcoming obstacles
1. How did you get started? Tell me about your business.

- Most people’s favorite subject is themselves.
- Listen to what is important to your borrower – honesty, speed, price, hard work, loyalty, etc.
2) What is going on in your industry?

- Is your borrower aware of competition that may take away business?
- Is your borrower considering a future investment in the building/equipment/people?
3) Where do you see your business in the next 5 years?
   - How will the future be financed?
   - What is the need for capital?
1) There are many different sources of capital and many different programs

- Banks
- Intermediary lenders
- Private Money
- Mortgages
- Receivable financing
- Leasing/Equipment finance
- Unsecured Loans
2) You set your own rate
3) Money remains difficult to obtain
Sales Techniques

• Keep their eyes on the prize
Sales Techniques

- Provide multiple options
Sales Techniques

• Discuss loan solution in terms of cash flow
Do you solicit business from a local commercial location where you frequently shop?
Thank you!

For more information, please call us at 800-262-2739