

Capvera Setter Script

Opening

“Hey, is this [Client’s First Name]?”

(If yes)

“Hey(client's name)this is [Your Name]how are you doing today?(Build Rapport).

Great. I was calling because I got a request that you were looking for [Type] capital for the business. I know you were not expecting my call. I just need about 10 minutes so I can get you pre-qualified fair?”

(If they say they’re busy)

“No problem. I just need a couple quick questions to see if this is even a fit. Takes less than a minute — fair?”

Then I’ll get you on my senior advisor’s schedule to dive deeper.”

Transition

(if say yes) Perfect. So what we’ll do real quick is I’ll run through a few qualifying questions on the business, then I’ll either transfer you live or lock you in with one of my senior advisors so they can dive deeper into your file.

Move Into Qualification

“Alright.

How long have you been in business?”

Basic Qualification Questions

(Ask in order. Write answers down. Keep it fast.)

1. “How long have you been in business?”
2. “What does the business do?”
3. “How much capital do you need?”
4. “What are the funds for?”

If they push back on answering:

“These are the filters the senior advisors use. Without them I can’t get you in front of anyone who can actually structure something. Takes 20 seconds.”

Transition to Close

“Got it. Based on what you just shared, this looks workable.

I can either transfer you live right now, or lock a specific time with a senior advisor later today.

They’ll dive deeper into the application and get you 3 to 5 offers today or tomorrow.

Which works better?”

Closing

Live Transfer:

“Actually, I have my VP of Funding available right now — let me transfer you to them.”

Set Appointment:

“When are you going to be by a computer or in a quiet space — morning or afternoon?”

(Once they answer)

“Perfect. I’ve got [time 1], [time 2], or [time 3] open. Which of those works best for you?”

“Locked you in at [chosen time]. You’ll get a calendar invite and text confirmation shortly.

When you jump on, just let them know you already went through the pre-qual.”

Objection Handles

“Just email me rates / info”

“Rates and structure are deal-specific. The advisors won’t quote anything until they see the basics we just covered. Fastest path is 10 minutes with them.”

“I’m talking to a few places”

“Most people we work with are. Let me transfer you to our VP of Funding — I see they’re available right now. They’ve been in the business for 20 years.

They’re not some 20-year-old broker who’s not going to take care of you. We believe in being your funding partner for growth until you exit or retire from the business. We treat our clients like family. We’re not just lending you money — we have many tools to help you grow, including industry-specific experts. We’re a true partner.

Give us 15 minutes of your time and let me show you what Alpha Capital can do.”

“Not ready yet” / “No”

“If I could get your business \$100k right now on good terms, you’re telling me you couldn’t use that to 3 to 6x your profits right now?

Help me understand — what’s actually holding you back from taking a look?”