

# Lenders

## What to do & When to do it With each part of your business

### Monday

#### Realtor Calls

1. List of 40 (Qualify)
2. Call all 40 on Monday
3. Birthday Program
4. Cards
5. Food
6. Gifts
7. Categorize as:
  - A, B, or C (A's = 4+ units per mo.)
8. Happy Hour Monthly
9. Lunch and Learn Monthly
10. Book Club

### Tuesday

#### Status Calls

1. Buyer
2. Buyer's agent
3. Seller's agent
4. Title/Escrow
  - Ask for referrals
  - Ask for the business
  - Request meeting with Seller's agent at close of escrow
5. Gift at closing for all

### Wednesday

#### Pre-apps

1. Call
2. Email
3. Send Video
4. Update file every 60 days
5. Ask for the Business

### Thursday

#### Top 50 Past Clients

1. 50 favorite past clients
  - Build profile (B-day, hobbies, spouse, kids)
  - Invite to quarterly client appreciation event
2. Birthday cards
3. Yearly event (movie, holiday party, etc.)
4. Call "2 Letters" per week on Thursday = 4 touches per year

### Friday

#### Top 50 Favorite People

1. Create list of top 25 most influential
2. Create list of top 25 business people you want to target
3. Call 10 per week
4. Meet 8 per month
5. Add to database
6. Birthday program
7. Ask for the business

### Builders

1. Call 10 every Friday
2. Stop by 2 per week
3. Join Builders association and take to monthly lunch