

Creating Your CLIENT PLAN



Welcome to the comprehensive guide designed for mortgage loan officers aiming to craft an effective client plan that not only meets but exceeds expectations. In this dynamic and competitive field, the ability to provide exceptional service from the initial consultation through to post-closing is paramount. This guide will walk you through the essential steps and innovative strategies to cultivate strong relationships, ensure seamless transactions, and foster long-term loyalty with your clients. Armed with these insights, you'll be equipped to elevate your client interactions, streamline your processes, and achieve unparalleled success in your mortgage lending career.



CLIENT SYSTEM

		TASK	COMPLETE
1	The Consultation		
	Meeting Conformation 12to24prior		
	After application: Mail TY Value and Call		
	All About You Form Completed		
	Email agent Pre-Approval Letter		
	Call Buyer's Agent to thank them		
	What to expect		
2	Handwritten TY card to buyer's agent		
	Pre-approval check-in call		
	OFFER ACCEPTED: E-mail to listing agent		
	Call listing agent, intro/congrats		
	What to expect/Under Contract		
	Hand written note card to Seller(s)		
	Mail "How to win the listing every time"		
	CD & letter to listing agent		
	Appraisal is in, /HW note to borrower		
	LO congratulatory call to borrower		
	What to expect /CTC email to borrower		
	LO congratulatory call to borrower CTC		
	Pre-funding email to borrower/cc agent		
	Pre-closing review numbers before close		

CLIENT SYSTEM

	TASK	COMPLETE
3	Closing call to borrower #'s / questions	
	Attend closing or call	
	Funded LO to call personally thank them	
	Request a 5-star Google review	
	Order pizza for delivery on move	
	Call referring agent and thank them	
	Deliver cookies to buyer's agent's office	
4	What to expect next now / funded email	
	Book follow-up calls: 6,1,6,1.	
	Book Annual Review	
	Add to DB/CRM	
	What to expect/Under Contract	
	Hand written note card to Seller(s)	
	Send The Team Closing gift	
	Send thank you letter to agent	
	Add agent(s) to our Top Agent email list	
	Did we get meeting with the Listing Agent	

1. **BEFORE – THE INITIAL “WOW”**
2. **DURING - (PRE-APPROVAL - CLEARED TO CLOSE)**
3. **CLOSING – HIGH TOUCH, CELEBRATE!**
4. **AFTER - CLIENTS FOR LIFE (VIPs, LOOKING FOR 1-REFERRAL A YEAR)**

YOUR: CLIENT SYSTEM

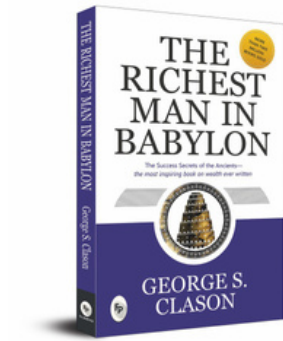
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YOUR: CLIENT SYSTEM

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Gifting

WHY WE CREATE AN EXPERIENCE
THAT NO ONE EXPECTS. Be creative!



Send this book once
we have our
consultation with
the homebuyers



When the offer is
accepted, send a
moving supplies care
package



When the loan is
approved, send
cookies

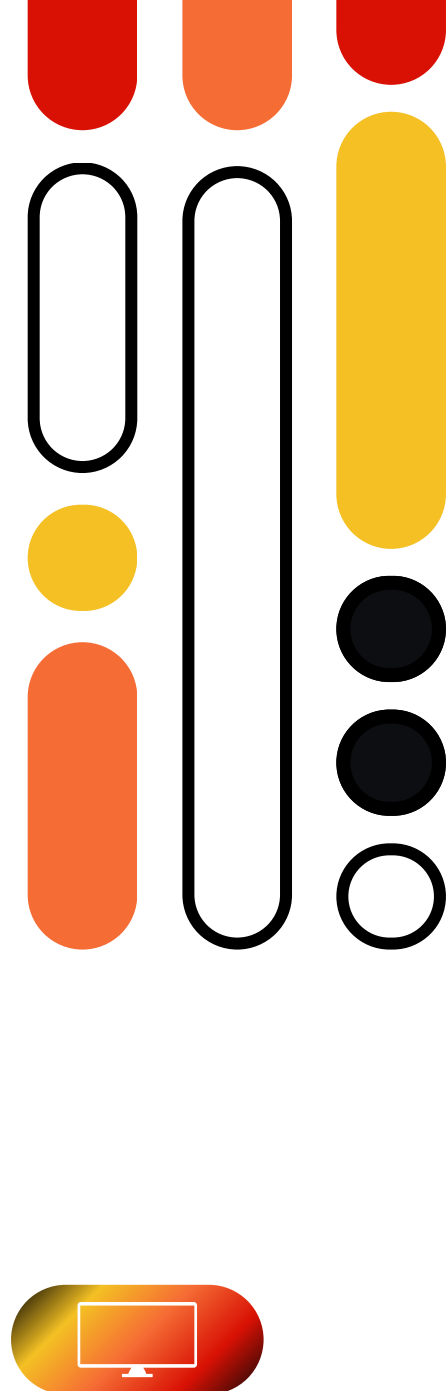


Once the loan is
closed, send an
engraved cutting
board

Embrace Your Path

In wrapping up this guide, we hope that you have gained valuable insights and actionable strategies to enhance your approach to client management.

Remember, the key to success in the mortgage industry lies not just in closing loans but in building lasting relationships and providing memorable experiences that clients want to share. By implementing the steps outlined in this guide, you are setting a foundation for a thriving career that is both rewarding and fulfilling. Keep striving for excellence, stay committed to your clients' success, and continue to embrace the journey of professional growth and development. Here's to your continued success as a mortgage loan officer!



For over two decades, we've been mentoring individuals on enhancing their lives through effective Life Practices. Visit our website for additional insights and tools to assist you on your path.

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