# Creating Your CLIENT PLAN

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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 | | |
| Handwritten TY card to buyer’s agent | | |
| 2 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 | | |

| | | 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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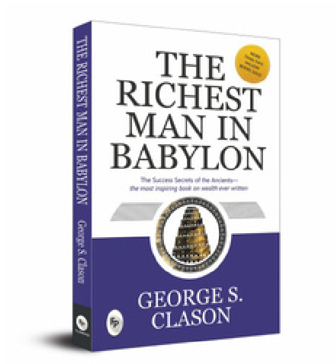
# Gifting

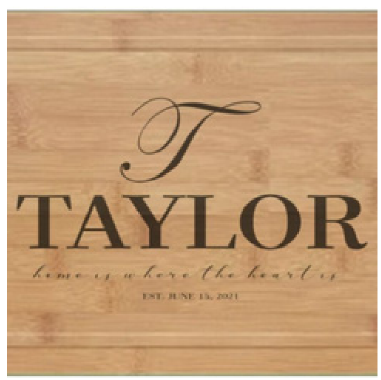
## WHY WE CREATE AN EXPERIENCE THAT NO ONE EXPECTS. Be creative!




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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