

The Numbers:

Weekly PreQuals

2

Monthly PreQuals

7

Weekly Applications

1

Monthly Applications

4

Weekly Funded Loans

1

Monthly Funded Loans

3

The Disciplines:

Prospect 90 minutes daily - Meet with 3 Realtors weekly and have 5 calls daily.

Update communication 2x each week with clients and Realtors.

Create the consultation habit so that every client/family gets a consultation every single time.

Master Product knowledge - Confidence comes from Competence.

Every time I meet with a Realtor use my mobile device to share stories and strategies.

A disciplined focused morning routine which includes practicing scripting and gaining product knowledge.

The Improvements:

Project List:

Create 4 consultations over the next 2 weeks. Due Date: January 15th

Work on my database to improve quality and classify A,B & C clients and referral partners. Due Date February 1st

Call both agents at least 2 times on each purchase.

Make Direct contact with all 2024 closed loans. Annual Financial Reviews

Learn new industry data to improve my mortgage practice. Constant