

Welcome to The 7 Pillar Success Planner! This tool is designed to help you diversify your business streams, set clear goals, and achieve consistent growth as a mortgage professional. Follow this simple guide to maximize your planner's potential.

Step 1: Define Your 7 Pillars

Identify the pillars you want to build or strengthen. These can include:

- 1. The Vykon Network: Your top 50 referrers.
- 2. Realtor Relationships: Partnering with top-performing agents.
- 3. Builder Relationships: Collaborating with builders through tailored financing solutions.
- 4. Corporate Benefits: Offering mortgage services as employee benefits.
- 5. Events: Leveraging workshops and client-focused events.
- 6. Commercial Loans: Exploring opportunities in business and investment lending.
- 7. Financial Planners & Insurance Agents: Creating referral partnerships.

Step 2: Set Your Goals

Use the planner's goal-setting sections to outline targets for:

- Annual, Monthly, and Weekly Volume: Measure your success by tracking your loan volume.
- Unit Goals: Set clear objectives for the number of loans closed.
- Lead Generation: Track your weekly and monthly leads to ensure your pipeline remains full.
- Applications & Pre-Qualifications: Focus on how many applications and pre-qualifications you generate.

Step 3: Manage Your Referral Standards

- Determine how many leads you expect per referral partner.
- Use the "Partners Needed" section to calculate how many partners are required to hit your goals.



Step 4: Plan and Track Your Progress

- Weekly Tracking: Log lead sources, meeting outcomes, and progress across your pillars.
- Pillar Development: Use the "# of Pillars Now" and "Pillars Added | Month" sections to monitor your journey toward building all seven pillars.

Step 5: Leverage Your Results

Regularly review your planner to:

- Assess where your leads and deals are coming from.
- Identify which pillars need more focus or additional strategies.
- Adjust your goals and tactics based on performance.

Step 6: Stay Consistent

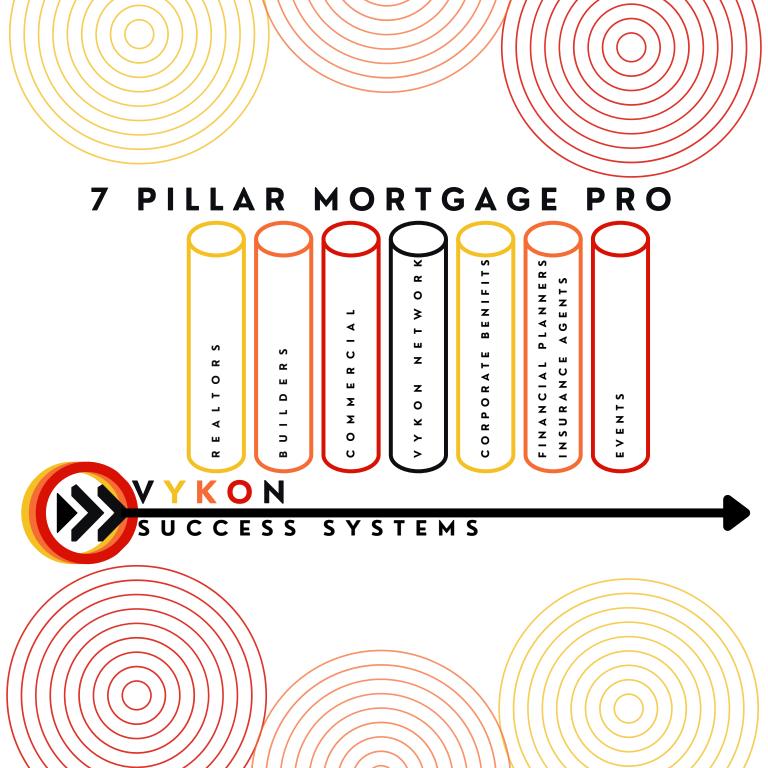
Schedule weekly planning sessions to:

- Evaluate your progress.
- Reconnect with referral partners.
- Fine-tune your strategies for each pillar.

Pro Tip for Success

"Success isn't built by chance—it's crafted by consistent actions, clear goals, and the right partnerships." Use this planner daily to take deliberate steps toward your goals, ensuring a well-rounded and thriving business.





BUSINESS PLAN

VOLUME GOALS

Annual Volume	
Monthly Volume	
Weekly Volume	

UNIT GOALS

Annual Units	
Monthly Units	
Weekly Units	

APPLICATIONS

Monthly App's	
Weekly App's	

PRE-QUALIFICATIONS

Monthly Pre-Qual's	
Weekly Pre-Qual's	

LEAD GEN MANAGEMENT

Monthly Leads	
Weekly Leads	

TARGET MARKETING

#of Pillars Now	
Pillars Goal	7
Pillars Added Month	
Date to Reach 7	
Weekly Meeting Goal	

REFERRAL STANDARDS

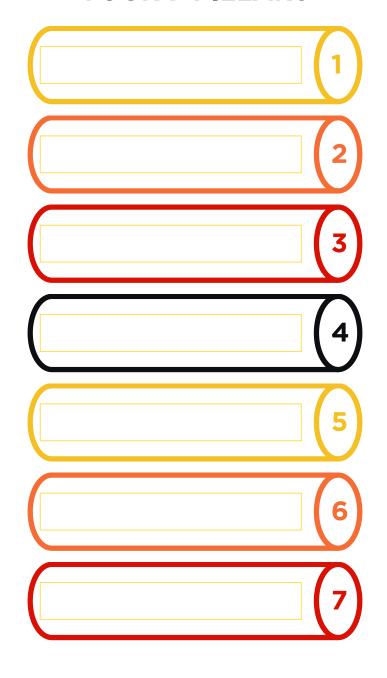
Leads Per Partner	
Partners Needed	

"SUCCESS ISN'T BUILT BY CHANCE—IT'S CRAFTED BY CONSISTENT ACTIONS, CLEAR GOALS, AND THE RIGHT PARTNERSHIPS. PLAN IT, TRACK IT, ACHIEVE IT." - DAN MUNFORD

CURRENT PARTNERS

PILLAR

YOUR 7 PILLARS



LEAD	SOURCE	STATUS

LEAD	SOURCE	STATUS

LEAD	SOURCE	STATUS

LEAD	SOURCE	STATUS

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THE RESULTS

VOLUME GOALS

Annual Volume	
Monthly Volume	
Weekly Volume	

UNIT GOALS

Annual Units	
Monthly Units	
Weekly Units	

APPLICATIONS

Monthly App's	
Weekly App's	

PRE-QUALIFICATIONS

Monthly Pre-Qual's	
Weekly Pre-Qual's	

LEAD GEN MANAGEMENT

Monthly Leads	
Weekly Leads	

TARGET MARKETING

#of Pillars Now	
Pillars Goal	7
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REFERRAL STANDARDS

Leads Per Partner	
Partners Needed	