

SAMPLE PLAN

January 2 – January 23 2023

LO QUICK START MARKETING PLAN

LO* _____

By signing, I hereby commit myself to my accountability partner to attain the goal of a minimum of 7 full applications in 21 days. I will NOT quit. I will NOT make excuses. I will respect the effort and time my accountability partner has committed to and I WILL COMMIT nothing less than a 100% effort at ALL times!

DAY: _____

***** PRINT OUT A SHEET FOR EACH DAY**

9am - 9:30: CHECK ON YOUR CURRENT DEALS with the processor and borrowers

9:30am - 10am: Call 2 NEW agents and ask for a referral

o Name and Number:

o Name and Number:

*** Look on Zillow for agents within a 10 mile radius of you can start compiling these names and contact information*

10:00am - 10:30am: Call 2 Agents from closings over the past 6-12 months and ask for a referral

o Name and Number:

o Name and Number:

*** Call both the selling and buying agents Agents from closed transactions*

10:30am - 11:00am: Call 5 old leads (did NOT close) and get a status and try to re-activate the lead to an full updated Application

o Name and Number:

o Name and Number:

o Name and Number:

o Name and Number:

o Name and Number:

*** Call old TBDs, Prequals, Leads you pulled credit, etc*

11:00am - 11:30am: Call 2 old borrowers (from actual closed loans)

o Name and Number:

o Name and Number:

*** Thank them for their business and ask for a Referral (NEW PURCHASE OR DEBT CONSOLIDATION LOANS)*

11:30am - 1:00pm: CATCH UP TIME / LUNCH

1:00pm - 1:30pm: WORK ON BUILDING YOUR PERSONAL DATABASE FOR 20 MINUTES AND TEXT/EMAIL/CALL 2 FOR A REFERRAL

- Name and Number:
- Name and Number:

*** Spend 20 minutes compiling additional names and numbers to your "personal" database - building a list of friends, family members, old classmates, friends of parents, etc for your database and the last 10 minutes send a text or email or call to 2 of your contacts asking for referrals*

1:30pm - 2:00pm: CALL 1 AGENT YOU KNOW AND ASK FOR THE NAME AND NUMBER OF ANOTHER AGENT AS A WARM LEAD

- Name and Number:

*** Agents you personally know, agents from closings, agents that Gerano knows, Teo knows, etc*

2:00pm - 3:00pm: CATCH UP TIME

*** Use this time for loans in progress, call backs, etc*

3:00pm - 4:00pm: RAPID FIRE ACTION ITEMS

- _____ *Call a current Agent (or new) and Schedule 1 agent coffee meeting for the following week*
 - Name and Number:
- _____ *Call 1 "other" referral source and ask for referrals and add to your "other" referral source database: eg CPAs, divorce attorneys, etc*
 - Name and Number:
- _____ *Cold Call 2 NEW agents and ask to send/ email a list of products*
 - Name and Number:
 - Name and Number:

4:00pm - 5:00pm: CATCH UP ON ALL ITEMS FOR THE DAY AND MAKE TO DO LIST OF 3 TOP PRIORITIES FOR THE NEXT DAY

TO DO #1:

TO DO #2:

TO DO #3:
