

Pivot For Success

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Steps to Pivoting Your Business For Success

1

Identify
Talent

2

Make initial
contact

3

Add to Pillar
Pyramid

4

Run applicable
tier strategy &
make
appointment

5

Program them
to know you
are there for
their success

6

Market to
them forever

Where To Meet Business Partners: Pillars Pyramid

Past Clients

Network Groups

Chamber Events

Local Business
Journals

Lunch & Learns

Door Knocking

Sphere

All About You form

3 Levels of Professional Relationships

Primary Level – You are their go to lender. They push you over others. If they had it their way, you would do every deal.

Business Level – They know you as the expert in some category (down payment assistance, VA, FHA, condos, manufactured homes, out of state loans, DSCR loans, bank statement program, other non-QM loans).

Backup Level – When a deal goes bad, if they need a second opinion, and or if the primary is unavailable.

Account Executive Call Strategy

LEADS

GO-TO-CONVO

TRANSACT

INVITE

LEADS:

How can we help them convert more

- Thank and acknowledge them.
- Give them an update on the status of the lead (we don't pre-approve without docs).
- Be interested, not interesting. Personal before professional.
- Ask them about the source (this helps me know how committed they are to you and how hard we need to push you as the business)
- Ask them about their status with the client: Did they meet? Is the client active with their business? Is this a Rush? Do they know about the client's timeline?
- Search needs: Consolidation Needs, Investment Opportunities, Life Changing Events, Sell Home
- Programming: We will contact the lead 7 times at a very minimum. Who else can we be following up on for you?

Transactions: Help Them

- Does the price point work for you based on what the client wants? Or do you want us to push it more/less?
- Programing: We will assess the clients position and recommend refinancing, purchase, or sell based on direction from business partner
- Would a faster closing help? 3 weeks? 2 weeks?
- Which program is needed? Non QM? Refi?
- Programing: If discretion is required based on life event, passion will be used.

GO TO CONVERSATION:

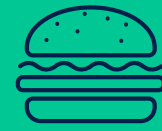
Eliminate the fear of making the call

- Industry update: rate trends, market trends, appreciation
- Loan program
- Sales tactic: from initial lead intake to negotiation tactics on how to get deals under contract
- Follow up on weekly market update, weekly videos, weekly status updates
- UW Guideline changes: good and bad
- Team update: staff and processes
- We specialize in: self-employed, VA, FHA, condo credit repair, RSU, Bridge Loans, Non-QM, etc.

invite



Happy Hour



Lunch



Dinner



Breakfast



Office Tour

THE ART OF PROGRAMING:

How do they feel after the conversation?

Rushed = Too busy

Low energy = overwhelmed

**Don't acknowledge leads or pre-approvals
= Disengaged**

Didn't thank them for the business = Ungrateful

**Didn't program them on reason to refer
= Just another basic lender**

- Take your time = Have capacity
- High Energy = Motivated
- Strategize about leads and pre-approvals = Wants to help them WIN
- Thanked them for the business = Grateful
- Programed them on reasons to refer = Created separation from the competition

Phone Burner

Monday: Always Calling Top 40 Agents and Shoppers

Tuesday: Tuesday update Agents / Primary Lists

Wednesday: Business Lists - Second Lists AM

Thursday: Backup Lists - Third List AM



**3 Hour
Sessions**



Mon-Thur



**12 Total
Hours per
Week**



**Results:
100-200
Agent / Bus
Prof called**

Marketing that runs in the Background:



Weekly
Video



Weekly
Newsletter



Monthly
Mastermind
Group



Monthly
Podcast
Link



Book Each
Quarter