



**Don't Gamble  
On the Future!**



Clarity  
Focus  
Persistence









SOFT LIGHT



LASER FOCUS



# BUMBLEBEE SYNDROME



# SHINY OBJECT SYNDROME



# LAUNCH





# LEVERAGE



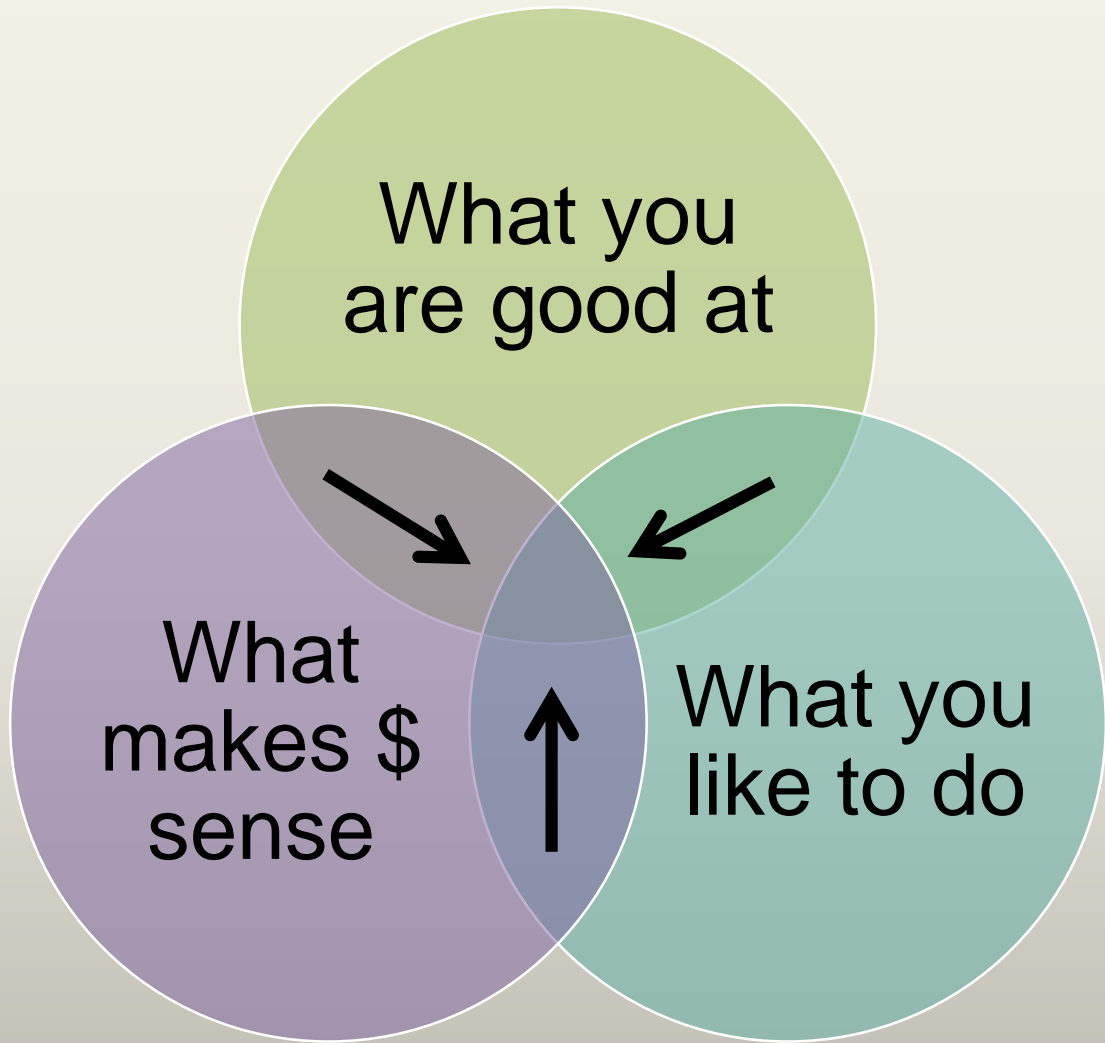


# Recognizing shifts



# Highest and Best Use





# Know your role

## FINDER (CEO)

- RAINMAKER
- GATEKEEPER
- BUSINESS DEVELOPMENT OFFICER



## MINDER (COO)

- PROCESS/OPERATIONS
- TRANSACTION FLOW
- CUSTOMER SERVICE



## GRINDER (CFO)

- BUDGET MANAGEMENT
- ADMINISTRATIVE DUTIES
- MINIMUM WAGES ACTIVITIES





# Note everything you do

PreApprovals  
Emails  
Plan the day  
Monthly mailers  
Learn products  
Keep in touch with database  
FAQ's  
Teaching  
Phone calls to prospects  
Return calls  
Client Visits  
Bookkeeping/payroll  
Networking  
Phone Calls  
Mentoring employees  
Pipeline Meetings  
Presenting  
Calling/meeting referrals  
Problem Solving  
Run errands  
Market research

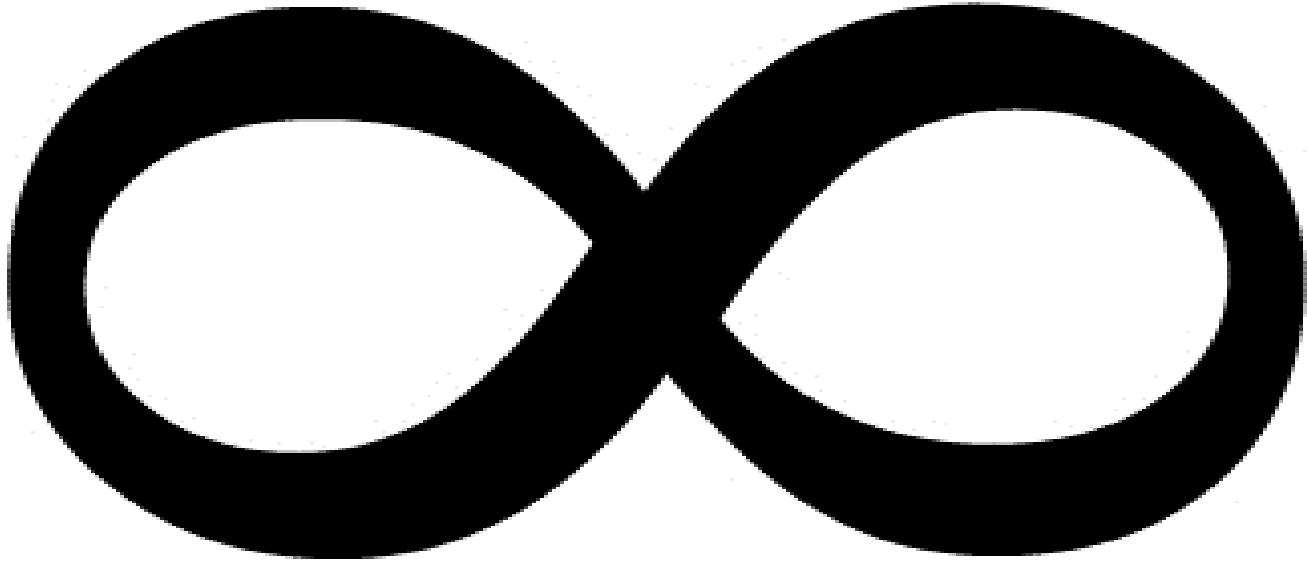
<b>Pro-Active INCOME</b> Generating Activities  <b>FINDER</b>	Loan Process/Operations Customer Service  <b>MINDER</b>	Administrative tasks & Marketing  <b>GRINDER</b>
Eat that Frog	Customer Service	Planning and review
1 <sup>st</sup> & 10s – Power Hour	Client Communication	Database management
Client/Partner visits	Loan Analysis for Finder	Budget management
Business meetings (stacking)	Loan Application Disclosures	Post closing follow-up
Networking	Staff Communication	Finder activity preparation
Mortgage Planning	Placement Analyst	Appointment Setting
Thank you notes	Thank you notes	Thank you notes



# ACTION



# Intensity & Focus vs LONG HOURS



Don't mistake  
movement for  
achievement

Activity for  
productivity

Rushing around for  
results!





## 2017 Marketing Calendar - Jen Du Plessis

1st Quarter	January	February	March
Pop-By Gift Idea:		<b>Theraflu, tissues, hand sanitizers</b>	
Reason to Call:	Happy New Year	Importance of Wills	2016 RE Market Stats
MBS Highway Market Report:	10th to Top 100		
Print Database (A-Z & A+-B)	1st		
Financial Advisor Mailer (CMPS)*:	Every 3 weeks (Marketing Dept)	Every 3 weeks (Marketing Dept)	Every 3 weeks (Marketing Dept)
Realtor Mailer (CMPS)*:	Every 3 weeks (Marketing Dept)	Every 3 weeks (Marketing Dept)	Every 3 weeks (Marketing Dept)
RateWatch Mailer:	First week of month	First week of month	First week of month
Divorce Newsletter*:	Monthly (email & mail)	Monthly (email & mail)	Monthly (email & mail)
Write Recommendation Letters:	Top 20 Realtors		
Charity Event:	<b>Shoebbox for Homeless</b>		
Other Event/Date:			<b>Spring Housing Briefing - DC - 23rd</b>
Other Event/Date:		<b>CFP Lunch-n-Learn - 8th</b>	<b>Spring Housing Briefing -Rockville- 15th</b>
Training and/or Speaking:	<b>DAAR-Realtor Mortgage Finance -5th</b>	<b>DAAR-LAUNCH &amp; BP - 2nd</b>	<b>Re/Max Sales Meeting -8th</b>
Training and/or Speaking:	<b>Chalk Talk - 18th</b>		<b>Pangle &amp; Associates -14th</b>
2nd Quarter	April	May	June
Pop-By Gift Idea:	<b>Peep Cupcakes</b>		
Reason to Call:	Spring Market Facts	Mother's Day & Improvement Help	Market Stats B4 end of selling season
MBS Highway Market Report:	10th to Top 100		
Print Database (A-Z & A+-B)	1st		
Financial Advisor Mailer (CMPS)*:	Every 3 weeks (Marketing Dept)	Every 3 weeks (Marketing Dept)	Every 3 weeks (Marketing Dept)
Realtor Mailer (CMPS)*:	Every 3 weeks (Marketing Dept)	Every 3 weeks (Marketing Dept)	Every 3 weeks (Marketing Dept)
RateWatch Mailer:	First week of month	First week of month	First week of month
Divorce Newsletter:	Monthly (email & mail)	Monthly (email & mail)	Monthly (email & mail)
Write Recommendation Letters:	Top 20 Referral Partners		
Charity Event:	Homeless Shoebbox Drive		
Business Mixer Date:			
Client Party Date:	<b>Sips &amp; Swirls - 29th</b>		
Other Event/Date:	<b>Spring Housing Briefing - Frederick - 6th</b>	<b>SEND VIDEO SAVE THE DATE FOR Client Appreciation Party</b>	
Other Event/Date:	<b>DAAR Sponsor - Pricing Strategy - 24th</b>	<b>Client Experience for CFPs &amp; Realtors - 10th</b>	
Training and/or Speaking:	<b>DAAR - Deep Dive - Lender Panel - 6th</b>	<b>DAAR Sponsor - Spring Fling -11th</b>	<b>DAAR Sponsor - New Member -8th</b>
	<b>NAMMBA Conference 6-9 Atlanta</b>		<b>MasterMind Summit* 6-10 Las Vegas</b>

\*Marketing Department responsibility

\*\*Jen emails distribution list

# UTILITY



- Improve Strategy
- Maximize Efficiency
- Reduce Cost
- Improve Customer Experience

# Resources

- Referral Partners
- Outsourcing
- Virtual Assistance
- Associations
- Advertising
- Mentors/Coaches
- Client Surveys
- Competition
- Continuing Education
- Software
- Apps

PUT  
SYSTEMS IN  
PLACE SO  
YOU  
DON'T HAVE  
LEAKS!



# POWER PARTNER PROGRAM

## **RICHER** Relationships

- Trust
  - Do I know them? Do I like them? Do I think they are creditable?
  - Learn WHO they are!
- Knowledge
  - Networking
  - Do I *really* know WHAT they do? Have I stereotyped them?
- Training
  - 2 meetings (one for them and one for us)
  - What to listen for
  - What we do really do for clients
  - What is our process
  - The BEST way they can help us (it may not be referrals)

# POWER PARTNER PROGRAM

- Referrals
  - Networking
  - Good, quality referrals and connections
- Evaluate
  - Consistent strategic conversations
- Keep the Cycle going
  - Thank them with something meaningful base on their interests or goals







Profit Partner



Cross-Promotion Partner\*



Power Group



Content Distributor

# NEEDS

## Conducting Great Interviews!

### FROG

Family, Recreation, Occupation and Goals

### 4 Questions:

- What is your goal this week/month?
- Who would you like to be connection with?
- What are 3 things I can do for you?
- Past, Future and Present



# CREDIBILITY

Believe in  
yourself.

# HABITS

MOTIVATION

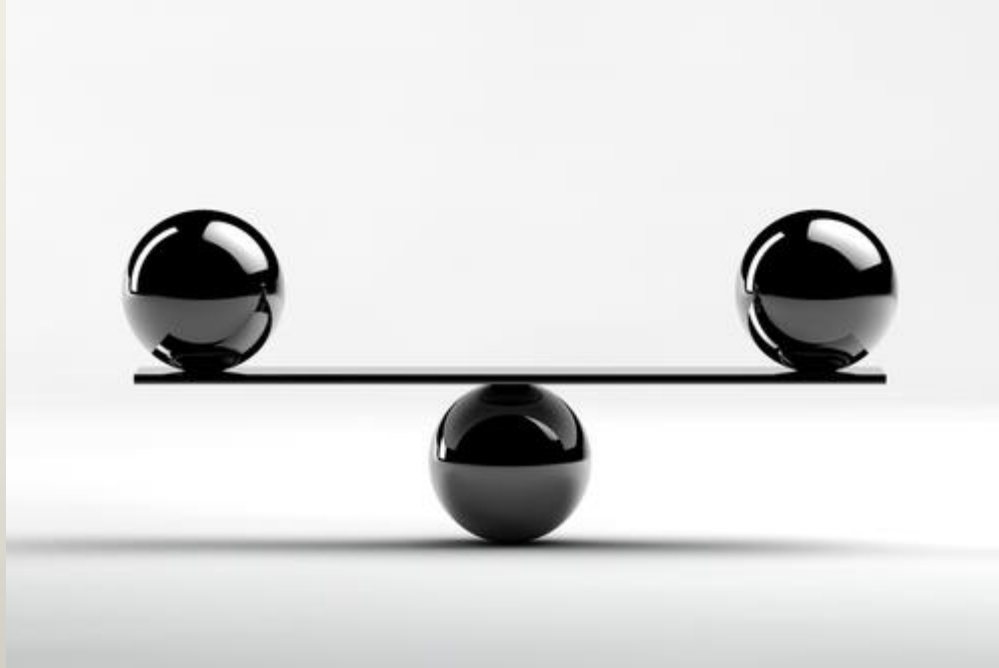
IS WHAT GETS YOU STARTED,



HABIT

IS WHAT KEEPS YOU GOING

# Balance isn't real!



# Time Compression



# Strategic Time Blocks

## Strategy Time

- Uninterrupted time scheduled in advance
  - No phone calls, no texts, no visitors
- Focus all energy on preplanned projects/activities
- Minimum of 2 hours per day

## Tending Time

- Low-Level activities
- Unplanned issues
- 30-minutes blocks (1-2 per day)

## Rest Time

- Designed to refresh & reinvigorate for more focus
- Sharpening your Ax

20	Monday	21	Tuesday	22	Wednesday	23	Thursday	24	Friday
	Workout/Daily Plan & review/Affirmations	Workout/Daily Plan & review/Affirmations	Workout/Daily Plan & review/Affirmations	Workout/Daily Plan & review/Affirmations	Workout/Daily Plan & review/Affirmations	Workout/Daily Plan & review/Affirmations	Workout/Daily Plan & review/Affirmations	Workout/Daily Plan & review/Affirmations	Workout/Daily Plan & review/Affirmations
	1st & 10s - PROActive	1st & 10s - PROActive	1st & 10s - PROActive	1st & 10s - PROActive	1st & 10s - PROActive	1st & 10s - PROActive	1st & 10s - PROActive	1st & 10s - PROActive	1st & 10s - PROActive
	1:1 or Client Meeting			1:1 or Client Meeting				1:1 or Client Meeting	
		Visit Clients and Partners				Stacking Day - 3 Referral Partners			
	Lunch with A+/A			Networking Meeting				Lunch with A+/A	
	1:1 or Client Meeting			1:1 or Client Meeting				1:1 or Client Meeting	
	Customer Service	Customer Service	Customer Service	Customer Service	Customer Service	Customer Service	Customer Service	Customer Service	Customer Service
	Blueprint Time	Blueprint Time	Blueprint Time	Blueprint Time	Blueprint Time	Blueprint Time	Blueprint Time	Blueprint Time	Blueprint Time

It's not the hours you put in; it's what you put in the hours.  
 Jim Rohn



Clarity  
Focus  
Persistence



# Blast Off

## Which does your practice look like?

- On Demand or in demand
- Transactional or Relational
- Compliment or complicate
- Referral Partners or fresh leads
- Cockiness or confidence
- Yes person or no person
- Bitter or better
- Mindset or heart Set
- React or respond
- Sit back or lean in
- Intern or PhD
- Scarcity or abundance
- Price or advice
- Has or Has been
- Soft skill and hard skills
- Cell phone or CRM
- Sprint or Marathon
- Offense or Defense
- Task switching or single tasking
- Advice vs price
- 5:1, 1:1, 1:5, 5:5
- Engine or Anchor

*If you do what is easy,  
your life will be hard.*

*If you do what is hard,  
your life will be easy.*

*-Les Brown*



NEED A LITTLE HELP GETTING STARTED?

TEXT "SPARK" TO 66866

Coming in May!

# **LAUNCH!**

## **Stop Talking. Take Action.**

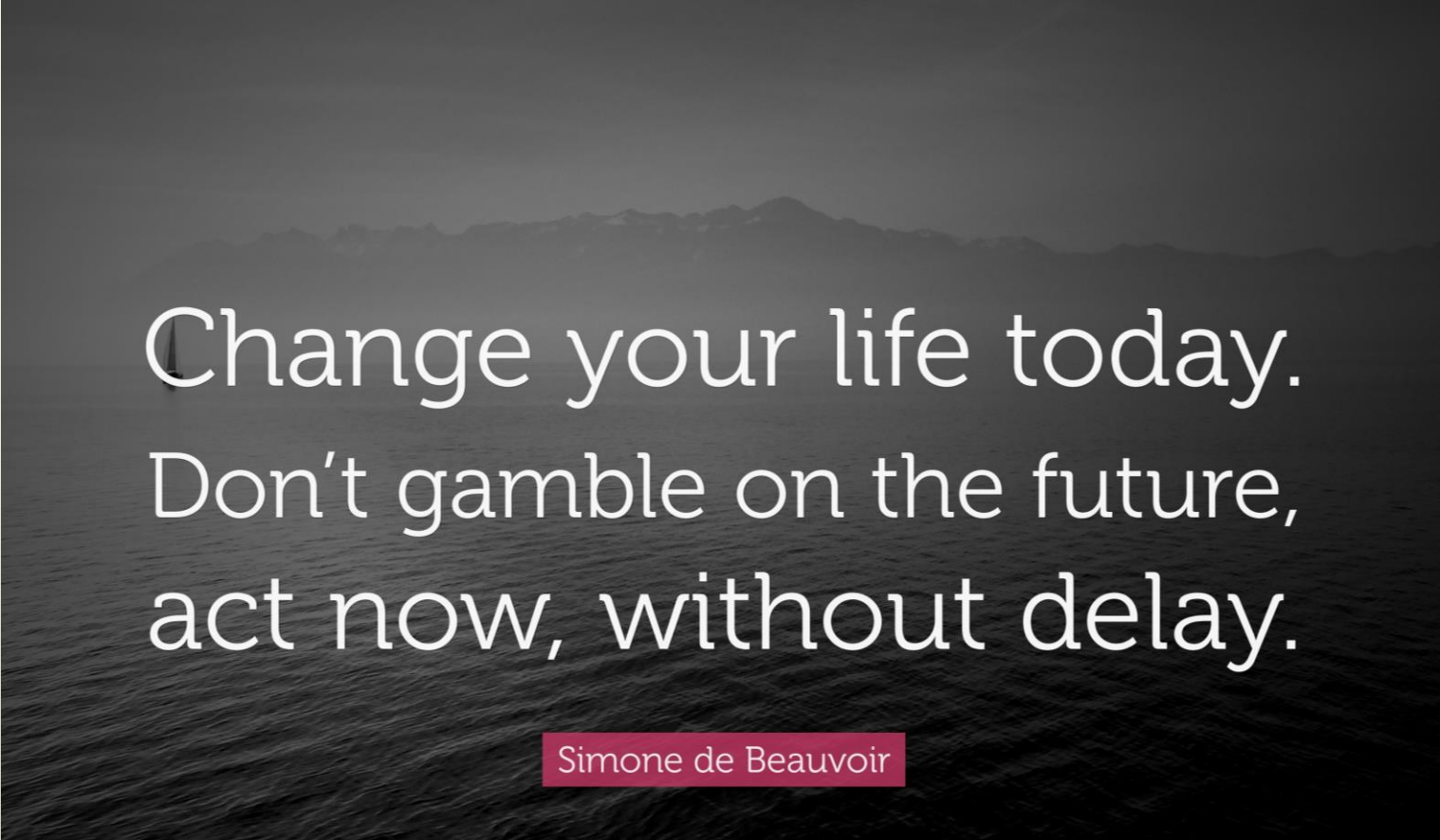
How to Take Your Business to  
New Heights With  
America's Mortgage Mentor  
Jen Du Plessis



Foreword by Michael J. Maher,  
*Author of 7 Levels of Communication*

# LAUNCH





Change your life today.  
Don't gamble on the future,  
act now, without delay.

Simone de Beauvoir