The Playbook

THE EXACT PLAN FOR WORKING WITH BUSINESS ACCOUNTS AND GOING DEEPER WITH YOUR PAST CLIENTS!

EVENT: THE EVERETT GOLF & COUNTRY CLUB
THURSDAY, JANUARY 29TH 10A-NOON

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dankeller
MORTGAGE ADVISOR MLO# 115349

naf newamerican FUNDING

THE HAND THAT FEEDS YOU

FOUNDATION TO A BALANCED BUSINESS

THE CORE TRAINING

You, your brand and your value. Get clear on that.

1. What is your brand? _____

2. Who do you help? _____

3. Why are you so important? _____

4. How do your clients view you? _____

5. What do your clients say in online reviews about you? _____

6. What is your “unique value proposition”? _____

NEVER answer why should I use you with an answer.

My Top 50 Past Clients

These are my favorite clients:

Here is what I do:

1. Email or mail to them every month
2. Call or text them monthly (rotate)
3. Visit them quarterly (pop by/cheesy gift)
4. Invite them to min of 2 social events per year
5. Add to private FB group

	Name	Address	Phone #	5 Star Review?	Birthday	Hobbies/Likes
1						
2						
3						
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It's All About YOU!

We strive to develop a strong professional relationship with each of our clients.
This form will help us better serve you during and after the mortgage process!

Name: _____ Spouse/Co-borrower_____

Are you a first time homebuyer or do you have a home to sell?_____

What are the main reasons why you are looking to purchase a home? _____

What are your biggest concerns entering this process? _____

What is the most important quality you are looking for in a mortgage professional? _____

Who can we thank for introducing you to us _____

More About You – (Some of your favorite things...)

Your B-day: _____ Spouse's B-day: _____ Wedding Anniv.: _____

children living with you: *their birthday (mon/day):*

_____

Pets/Names?_____

Fav soda or cold drink? _____Spouse/Co:_____

What college did you attend? _____ Spouse/Co: _____

Fav. restaurant? _____ Spouse/Co: _____

Fav. adult beverage? _____ Spouse/Co: _____

Favorite charity? _____

Fav. dessert? _____Spouse/Co: _____

Fav. candy/snack _____ Spouse/Co: _____

We're Excited To Be Your Mortgage Partner!

Who Else Is On Your Wealth Team? (If "yes", please rank them...)

	YES/NO	*rank on a scale of 1-5 (5 being best)*				
Financial Planner	_____	◎ 1	◎ 2	◎ 3	◎ 4	◎ 5
Insurance Agent	_____	◎ 1	◎ 2	◎ 3	◎ 4	◎ 5
Accountant	_____	◎ 1	◎ 2	◎ 3	◎ 4	◎ 5

🙏 We Need Your Help! 🙏

When we do a great job and exceed your expectations, can we count on you to recommend us to at least ONE person who may benefits from our services in the coming 12-months?

☐ **Yes** ☐ **No**

DAN KELLER, MORTGAGE ADVISOR MLO# 115349 POWERED BY naf newamerican FUNDING

Past Client Opportunity Worksheet

1. # of past clients in your database _____

2. Multiply # of your past clients by .15 (or 15%) = _____ potential.

3. If you close 50%. off those past client leads = _____ potential converted leads.

4. Your average price point per deal = $_____

5. Opportunity cost = converted leads _____ X average price per deal

$_____

6. You are leaving this much on the table by not working your database:

$_____ !!!

Example:

300 Past Client database, 15% buy/sell every year, with a 50% conversion rate, at $20,000 per deal = **$460,000 of potential income**!

Top 50 Business People (VIPs)

These are my VIP Business people:

Here is what I do:

1. Email and mail to them every month (Letter of the heart and Evidence of Success) - Email video once a month
2. Call them monthly - Call this list on Monday, have a plan for call (meet, invite, how can I help)
3. Visit them quarterly (lunch or happy hour to talk business) OR Pop-by office gift (cookies, goodies, drinks…)
4. Invite them to 4 social events per year - MAKE SURE THEY ARE ADDED TO B-DAY PROGRAM (A-B-C)

	Name	Address	Phone #	Email	Birthday	AAY FRM	Hobbies	Recently Referred
1								
10								
20								
30								
40								
50								

Top 50 Business People (VIPs) - Building List

These are my VIP Business people:

Here is what I do:

1. Email and mail to them every month (Letter of the heart and Evidence of Success) - Email video once a month
2. Call them monthly - Call this list on Monday, have a plan for call (meet, invite, how can I help)
3. Visit them quarterly (lunch or happy hour to talk business) OR Pop-by office gift (cookies, goodies, drinks…)
4. Invite them to 4 social events per year - MAKE SURE THEY ARE ADDED TO B-DAY PROGRAM (A-B-C)

	Industry/Job Title		Name		Phone #		Notes
1	CPA						
2	Financial Planner						
3	Car Salesman/Finance Dept						
4	Fitness Trainer						
5	Chiropractor						
6	Medical Doctor						
7	Massage Therapist						
8	Dentist						
9	Orthodontist						
10	Roofer						
11	Inspector						
12	Contractor						
13	Mover						
14	Flooring						
15	Painter						
16	RE Investor						
17	Interior Designer						
18	Architect						
19	Restaurant Owner						
20	Server/Bar tender						
21	Golf Pro						
22	Church Member/Pastor						
23	Kid's coach						
24	School Teacher						
25	Electrician						
26	Plumber						
27	HVAC						
28	Landscaper						
29	Estate Attorney						
30	Divorce Attorney						
31	Property Manager						
32	Handyman						
33	Assisted Living Director						
34	Hunting/Fishing Club						
35	HR Director						
36	Best Friend						
37	Best Friend						
38	Family						
39	Local Mayor						
40	Insurance Agent						

As you create this list, remember, VIPs must be developed. These are connectors OR raving fans!
Start w/ your own database and sphere.
Start with 20-25 people to take care of.
A true "VIP" is someone that can refer you 4 referrals a year. A "Whale" is someone who refers you 10 times a year!