



Ramping up Realtor Referral Sources

The Answer to Increasing Sales Results



Are Your LOs Struggling to Increase Realtor Referral Sources?

According to a recent NAR survey, 86% of homebuyers purchased their home through a real estate agent. Real estate agents are still the dominant providers in generating referrals for originators.

The sales challenge for originators is that the top 10% of real estate agents originate 90% of the yearly real estate transactions. The upper tier agents are sophisticated business owners that will not spend time with an unprepared and incompetent loan officer.

But many LOs are calling on and looking for business from the bottom 50% of Realtors. Why? Because these originators don't have the **selling skills** and **confidence level** to disrupt their competition regardless of the size of their lender.

How can sales teams gain traction with the better real estate agents?

My **Ramping Up Realtor Referral Sources** sales training program (RRS) is the answer. RRS is an intensive sales program that instills the best practices in modern selling techniques including an emphasis on social selling channels and differentiation strategies. This innovative program is based on what really works in mortgage banking today and emphasizes sales practices that move the sales needle.

Ramping Up Program Details

- Dynamic 8-week program 100% focused on the latest prospecting and selling techniques including social selling channels.
- Instructor-led by mortgage sales expert, Pat Sherlock and author of "Reaching the Top of Your Game: Best Practices of Top Mortgage Originators."
- Students are called on to discuss topics and share their selling experiences. Homework is assigned and reviewed in class.
- Class size is limited to 10 students or less to allow for high student interaction and optimum results.
- Live instruction by webcam to answer questions and share feedback in real time.
- Emphasis on using social selling channels, videos and webinars for maximum outreach to borrowers and referral sources.
- Managers receive feedback on students' performance in class and follow-up checklists regarding homework assignments.



Who Should Attend?

- Experienced originators struggling with inconsistent production.
- New LOs to the mortgage industry or those who have worked on the operations side of the mortgage business.



What is the Program's Success Rate?

- In recent training classes, two-thirds of students generated loans and were in the process of closing loans.
- All students had meetings with referral sources who they had not done business with before.
- Our high success rate is tied to holding students accountable for their lead generation.



Why Choose Our Program?

- We're the only **LIVE training program** based on the latest neuroscience research on selling and social selling practices.
- This tactical program uses active learning methods for better outcomes and holds students accountable.
- 100% lead generation focused on targeting, positioning, planning and conducting Realtor and consumer sales interactions.



What Our Students Are Saying

"It has been very helpful. I liked the social selling aspects and being able to implement those skills with Realtors, family and friends."

– MS, Truist

"I found the hands-on sales training valuable, especially the focus on developing social media skills."

– AK, Ross Mortgage

"It has definitely opened my eyes to social networking. I know it's an area of opportunity for me."

– EP, AmeriCU

"I'm a new LO and have had several training courses and this one was the best because it was relevant and current. Other training companies make mortgage a math business and don't focus on prospecting."

– CB, CMG Home Loans

"I'm on the right track. I learned a lot from your class. You not only taught me valuable information but also shared lots of extraordinary experiences. You are one of the most influential people in my career."

– LZ, CMG Home Loans

"I've had a lot of training but this course was so much more impactful because it gave me the blueprint to originate referral sources and borrowers."

– RW, Guild Mortgage

"I definitely took things away from the class that I will be able to use."

– KF, AmeriCU

"I've learned more in this class than I've learned over the past year. I think it's been great."

– JW, Fulton Mortgage Co.

"The course was super-helpful. I've generated appointments with referral sources already."

– CP, CMG Home Loans

"This is the best training I've had. Very interactive!"

– MG, Sandy Spring Bank

"The course was eye-opening – a game-changer."

– SG, CMG Home Loans

"The classes were very thorough and interesting."

– DM, Ross Mortgage

"The class has provided the blueprint for sales success. It filled in so many blanks for me."

– BM, Movement Mortgage

"It helped me get a lot more comfortable having those conversations with Realtors and prospects."

– DC, Gateway First Bank

"The classes apply what you learn into real world business situations."

– DD, Movement Mortgage



What the Program Covers

The training course consists of 15 live webinar sessions that cover the following topics:

- Identify Your Target Market: Understanding the Realtor Landscape & Creating a Targeted Marketing Plan
- Determine What Realtors & Consumers Value; Selecting a Value Position
- Warm up a Cold Call: Using LinkedIn & Facebook to Make Better Calls
- Establish Professional LI & FB Profiles
- One-to-One vs. One-to-Many Marketing: When to Use Each Strategy
- Powerful Phone Call & Voicemail Scripts
- Understand Communication Styles & Align Sales Presentations
- Social Selling Platforms: How They Fit into Your Prospecting Strategy
- Sales Cadence: Develop a Powerful Follow-up Process
- Technological Tools in Prospecting
- Master Realtor Team Meetings; Lunch & Learn Seminars
- Disrupt Your Competition in Five Stages
- One-to-One Personalized Marketing Plan Review
- Review of Student's LI Profile; Target List; and Messaging
- Dynamic Sales Presentation at a Real Estate Broker Meeting

All sessions are conducted by live webcam where students can get their most important questions answered in real-time.

Why Our Sales Training Beats the Competition

Sales leaders have many choices in selecting their training partners. Our training is a step above the competition because of our methodology, instruction expertise and delivery.

Learning by Doing Leads to Better Sales Results



According to the latest research, the most impactful sales training programs employ an active learning approach known as “learning by doing.” A foundational component of my Ramping Up training program is having students practice their new sales skills during class. This method has a number of advantages over traditional passive training programs including:

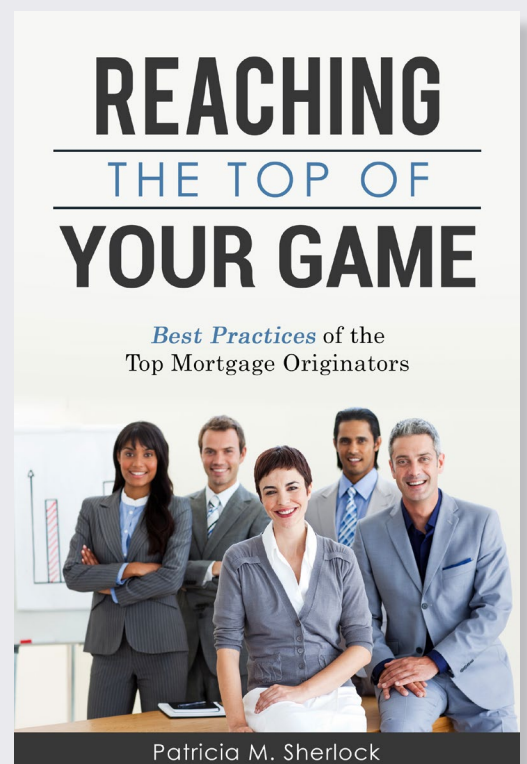
- Increased student retention rates of new material.
- Increased student engagement in their own improvement process.
- Better proficiency at new skills because students are allowed to practice new sales behaviors and receive feedback on their performance in a safe environment.

| | Ramping Up Referral Sources Program | Other Sales Training Programs |
|---|-------------------------------------|-------------------------------|
| Live via webcam | ✓ | ✗ |
| Active learning approach aka “learning by doing” | ✓ | ✗ |
| In-Class Sales Presentations | ✓ | ✗ |
| Q&A | ✓ | ✗ |
| Guest speakers including top Realtors and top producers | ✓ | ✗ |
| Student Assessment Provided to Manager | ✓ | ✗ |

Training Program Instructor



Pat is a former head of sales in mortgage lending who has made it her mission to train originators to self-source their production. She has written the sales handbook in mortgage banking on selling techniques (*Reaching the Top of Your Game: Best Practices of Top Mortgage Originators*). Her training programs are grounded in what works in the real world based in creating loan demand. Pat has trained hundreds of originators over the years; she is an in-demand key note speaker and has authored numerous articles in all national mortgage trade publications. Pat is passionate about helping originators get to the next level in their sales career and bringing a new generation into mortgage lending.



Three Key Reasons to Invest in Ramping Up Realtor Referral Sources Sales Training

In a hyper-competitive mortgage marketplace with lower margins, every transaction is important to a lender's profitability. The battle for business is won in the sales trenches where the skill set of every originator matters. The better a lender's originators are trained, the stronger a lender's business is going to be.



Trained Originators Equal More Sales

A well-trained loan officer will be able to better influence potential and former customers and referral sources by knowing how to best approach them, discuss their needs and offer the right solutions.



Attract More Talent and Retain Them

Attracting the right talent impacts a lender's bottom line. Research has shown that good training not only helps employees meet their personal goals and win more deals, but reduces originator turnover because a lender is investing in their employees' personal development. Leaving the employee to develop on their own lessens their commitment to a lender.



Better Customer Experiences

Learning new skills is a smart way to motivate, engage and empower the sales team. It shows that a lender is invested in their employees' success as a professional. This translates into better interactions with referral sources and customers. Good sales training that improves the customer interaction leads to more referrals and repeat transactions.

Contact Us to Enroll



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Book a Call



Your Instructor:

Pat Sherlock is a sales training leader in mortgage banking and a best-in-class MBA Education instructor. Her team provides education that is tactical in the real world of mortgage sales.