

MORTGAGE PROSPECTING UNIVERSITY

PROGRAM 1

CORE PROSPECTING SKILLS

LENGTH **8 hours (4 sessions)**
including 30 days of Roleplaying

SESSION 1 Finding Referral Prospects

- Targeting the Right Audience: Selecting Your Niche That You Can Win and Building a Target List: Research & Qualify Who Is Actually Generating Real Estate Transactions & Start Your Connection Plan
- Articulating a Value Pitch & Recognizing What Is Intrinsic and Relative Value
- Grabbing a Prospect's Attention & Personalizing It: What Will You Offer to Get Them to Meet You? Your Attraction Strategy
- Warm Calling: Using the Most Scalable Prospecting Tool—the Phone; What to Say and How to Leave a Powerful Voicemail to Get a Call Back & Schedule a Meeting
- Your 30-Day Prospecting Cadence & Implementing: Weekly Call Plan

SESSION 2 Mastering the "Initial Prospect Meeting"

- The 20-Minute First Meeting Winning Structure: Plan for Success
- How to Build Rapport in 5 Minutes
- Open-Ended Question Sequence: Scripting Roadmap
- Presenting Your Value
- Asking for the Business: Starts with a Next Meeting

SESSION 3 Handling Objections & Overcoming

- Five Common Objections by Realtors and Customers
- Being Prepared to Respond
- Actively Listening & Identifying the Real Problem
- Reframing the Objections
- Asking for the Business Role Play: Two Hours



- Podcast Interviews of Top Realtors, Top Producers & 10 Questions for Borrowers
- Mastering the First Meeting with Realtor Referral: Customer Interaction
- Mastering the Triple Threat in Prospecting

PROGRAM 2

NEXT LEVEL PROSPECTING SKILLS

LENGTH **10 hours (5 sessions)**
including Video & Webinar Practicing

SESSION 1 Video & Personal Branding

- Defining Your Target Audience for Video
- Types of Videos You Implement
- Create Engaging Content—Right Structure
- Tools Make a Difference & Optimize Different Platforms
- Presenting an Authentic Self Practice: Action, Camera

SESSION 2 Winning at Presenting in Front of Groups

- Understanding the Three Learning Styles
- Start with the End in Mind—Structure the Presentation for 30 Minutes
- Determining Your Hook; 3 Main Points; No Brain Dump
- Sharing Stories to Grab Attention & Visual Aids—How-to Design
- CTA: What Is the Next Step or Interaction You Want? Practice: Presenting in Front of a Group

SESSION 3 Not Getting Customer Referrals

- Important Part of Prospecting but Rarely Engaged
- What Wows Customers Today: Closing on Time Is Not Enough
- Expected Versus Unexpected Services
- Seven Commandments
- Delighting Activities & Tools That Make a Difference; Brainstorms to Delivering a Wow Interaction

SESSION 4 AI and ChatGPT for LOs

- Overview of ChatGPT's Capabilities
- Leveraging AI for Customer Segmentation
- Personalizing Sales Pitches Using AI Insights
- Roleplaying Using ChatGPT
- Implementing ChatGPT in Your Sales Process



- Call Reluctance—What Is Holding You Back?
- Understanding Communication Styles

PROGRAM 3

PROSPECTING MASTERY

LENGTH **25 hours (8 sessions)**

- Identifying the Right Fit, Presenting Value, Asking for the Business
- Roleplaying to Practice and Refine Sales Techniques
- Personalized Coaching to Ensure Accountability