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Productivity Tips



Healthy Habits

What is your Goal and how hard are you willing to work for it?



Does your Family & Support Team know the goals you have set for yourself?



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Have you completed the projection tool from our 1st webinar?





Projection Tool



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FINANCIAL WHOLESALE

Loan Officer Projections for 2017

*PLEASE Fill Out Everything in **YELLOW***

Loan Officer Name	John Smith
Branch Name	San Diego
2017 Projected Income	\$ 250,000

Average Loan Amount	\$ 250,000
Purchase Percentage	0.00%
Refinance Percentage	0.00%
Commission Split	110 BPS

Production	January	February	March	April	May	June	July	August	September	October	November	December	2017
Purchase Units (Realtor)	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0
Purchase Units (Builder)	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0
Purchase Units (Referral)	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0
Refinance Units	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0	\$ - 0
Total Production	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Units	0	0	0	0	0	0	0	0	0	0	0	0	0



Accountability Tool



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WEEK 1

Activity	Goal	Actual	% Completed
Friday & Monday Calls			0%
F2F Meetings Set-Up			0%
F2F Meetings Completed			0%
Listing Agent Meetings			0%
RE Office Visits			0%
Realtor Lunches			0%
"Thank You" Cards			0%
Office Presentations			0%
Realtor Board / Caravan			0%
Networking Event			0%
Open Houses			0%
Pass Out Business Cards			0%
Enter Names into CRM			0%
Marketing Pieces			0%
Past Client Calls			0%
Pre-Quals			0%
Your Goal Here			0%
Your Goal Here			0%
Your Goal Here			0%
Your Goal Here			0%

Notes:



Creating Your Business Plan

- State your Goals
- Create Milestones
- Timelines
- Be Consistent but Flexible
- Commit to Paper
- Keep it Simple



1 Year Goals

Personal

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Professional

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____



5 Year Goals

Personal

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Professional

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____



Creating Your Business Plan

- State your Goals
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Building the Plan

- 30 Activities a Week
- Talk to 300 People
- Pre-Qualify 20 People
- Take Three Complete Applications (156 Year)
- Close 120 Loans



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Watch the “Key players” in the Mortgage Industry.

Are you learning how the Successful Originators plan their days?





Let's look at a Calendar

Week	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
7:30 AM	<i>Morning Brief</i>	<i>Morning Brief</i>	<i>Morning Brief</i>	<i>Morning Brief</i>	<i>Morning Brief</i>	Breakfast
8:00 AM	Meeting with Sales Manager	Misc. Paperwork	Misc. Paperwork	Misc. Paperwork	Misc. Paperwork	
8:30 AM						
9:00 AM		Visit Re/Max of Denver Sales Meetings - stop in and say "hello"	Breakfast w/ Danny Janter?	8 Database Calls	Company Sales Meeting	Visit development with Sara Speckle
9:30 AM						
10:00 AM	8 Database Calls		8 Database Calls		8 Database Calls	
10:30 AM						
11:00 AM		Visit Re/Max - leave Caley Interest-only flyer			Travel and set-up	
11:30 AM	Lunch w/ Donna Nixon	Review pipeline with Processors	Bring in Lunch to Team	Attend Board of Realtors Luncheon	Lunch 'n Learn at CPA Donaldson, Inc. - 5 CPAs	Plan for next week and tally all numbers
12:00 PM						
12:30 PM						
1:00 PM						
1:30 PM	Leave Sherry Vickery note	8 Database Calls		Attend closing for Karen Thompson		
2:00 PM						
2:30 PM	Loan application for David Dodd					
3:00 PM		Visit new development near home - determine	Meet w/ Donna Nixon			
3:30 PM						
4:00 PM						
4:30 PM						
5:00 PM						
5:30 PM						
6:00 PM	Late Night	<i>Debrief</i>	Date Night	<i>Debrief</i>	<i>Debrief</i>	
				MORNING BRIEF:		DEBRIEF:
	<i>Debrief</i>		1. Review Economic news and prepare PEG 2. Review loans in process 3. Input PQs in Database 4. Clear e-mails and voicemail 5. Leave key voice mails - processors, agents, etc.		1. Clear the runway - Return ALL calls and emails 2. Calculate your miles- Measure and record your day 3. Create your next day flight schedule	



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Achieving your Goals





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Time Management:

- Setting clear goals – projection tool
- Breaking your goals down into discrete steps

Prioritizing

Organizing

List Making

Review – is it working?

- Avoiding Procrastination!

Eat That Frog – Do that one most difficult task early in the day and the rest of your workload will seem like a breeze after that.





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Are you using a Contact Management System?





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Do you know the Products available?



Real knowledge is to know the extent of one's ignorance.

-Confucius



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“What fits your busy schedule better, exercising one hour a day or being dead 24 hours a day?”



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Give Your Ideas Some Legs:

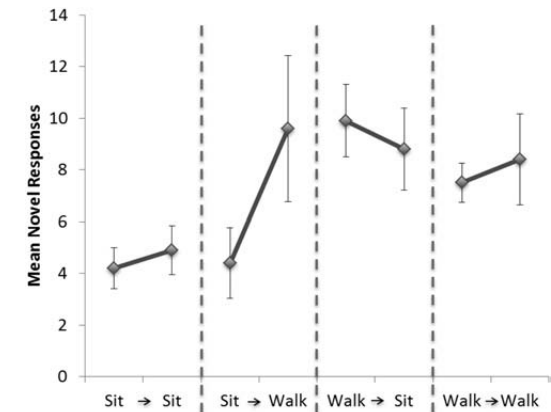
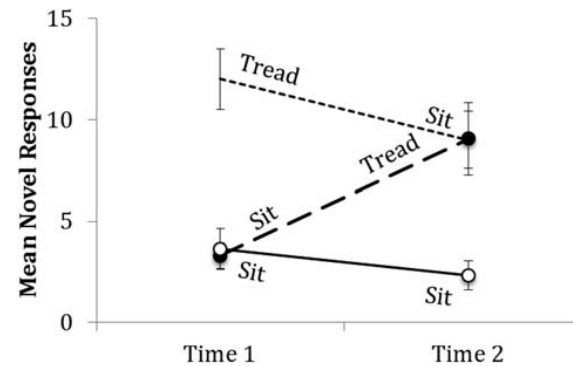
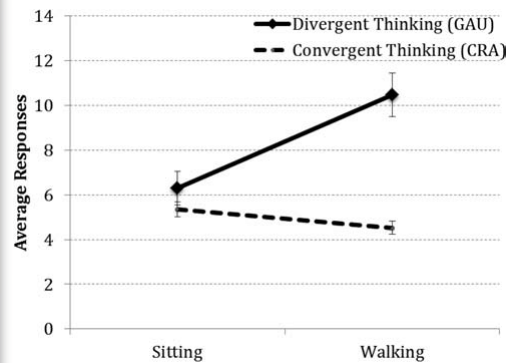
The Positive Effect of Walking on Creative Thinking

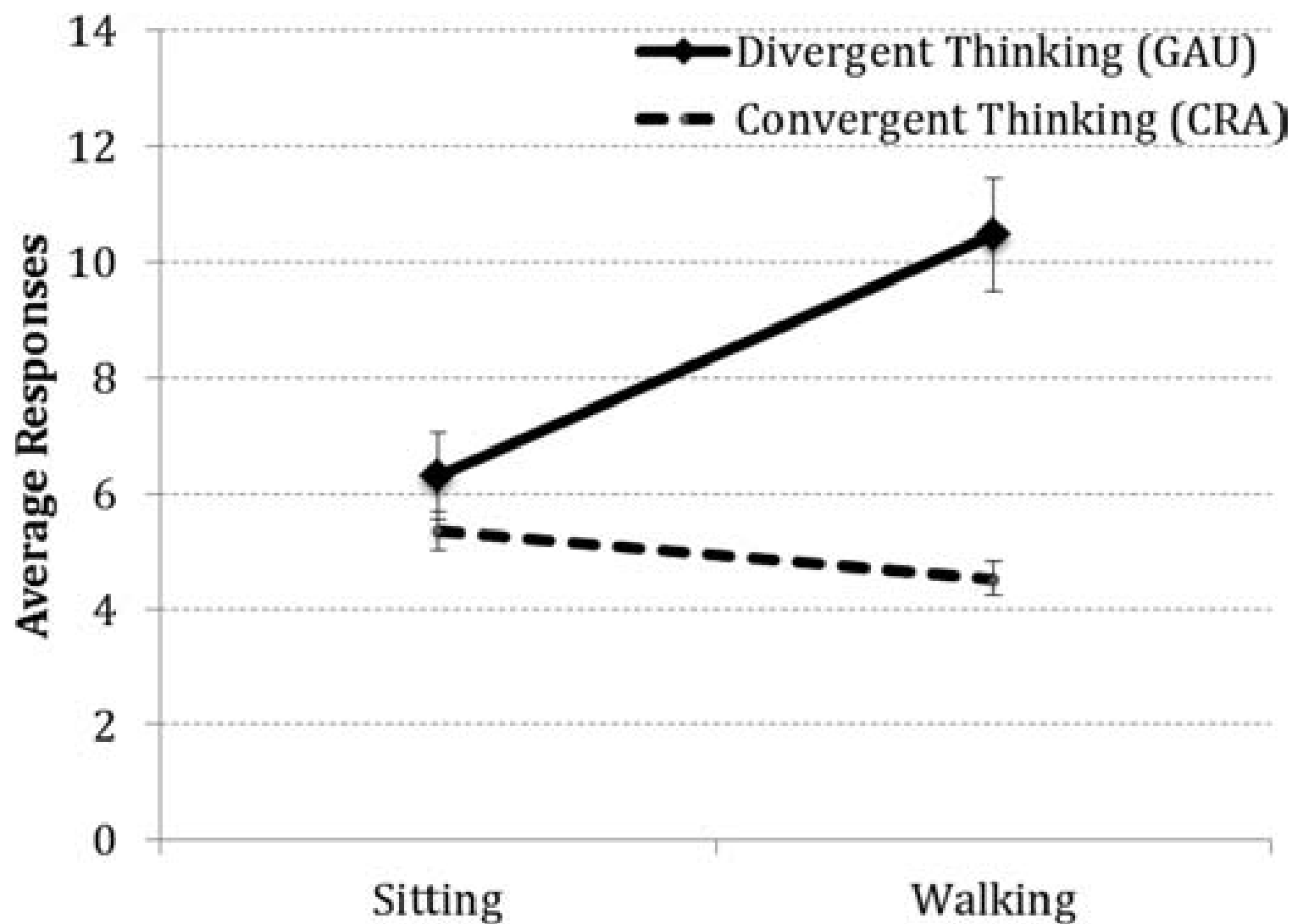
Journal of Experimental Psychology:

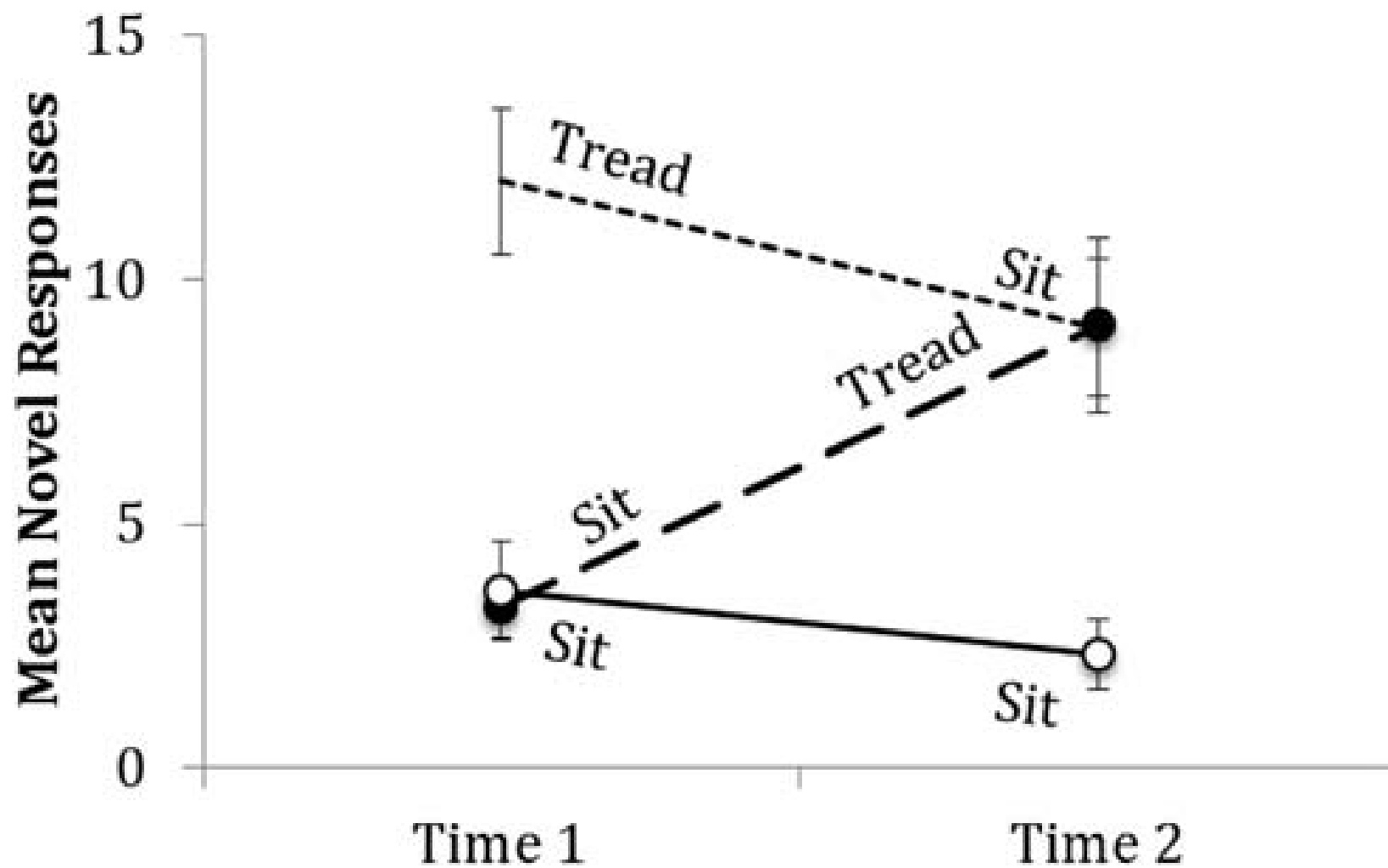
Learning, Memory, and Cognition

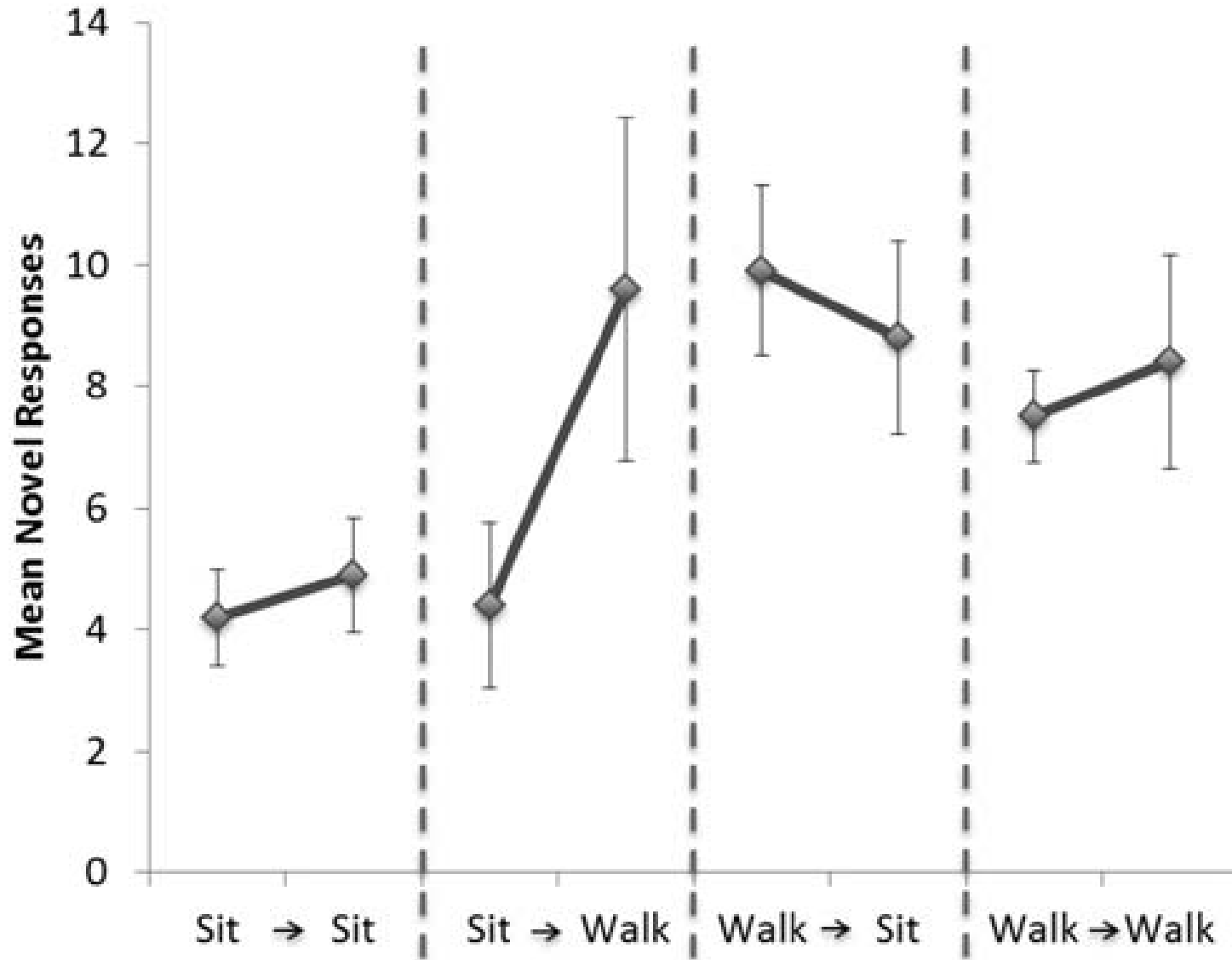
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Sales Techniques

- Positivity
- Body Language
- Reliability
- Knowledge



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Questions?





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Setting your self up for Success Webinar Schedule:

January:

Preparing for a Successful Year– online recording available

Marketing Social Media – online recording available

February:

Productivity Tips – online recording available

#4. Cyber Security Awareness, 21st 10-10:30am

March:

#5. How to build a Referral Based Business, 7th 2-3pm

#6. Market Insights, 21st 10-11am

Credits:

Eat that Frog by Brian Tracy

Stanford University: Journal of Experimental Psychology: Learning, Memory and Cognition

Forbes: 30 One-Minute Productivity Reports



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Thank you for joining us!

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