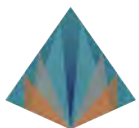




The Defining Difference
BY CINDY ERTMAN

Denise Donoghue's Biggest Takeaway Guide



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We are truly grateful to be able to share the special gifts of talented mortgage leaders like Denise Donoghue. Denise is a testament to the fact that having a successful mortgage business does not mean you need to be involved in the everyday details. Denise has mastered the art of delegation through creating the systems and processes that allow the strength of each of her team members to shine, while she can continue to lead and strategize the long-term growth and success of her business.

Here are a few key takeaways from Denise's call:

1. **Work your database!** Create automated email campaigns and live events to ensure that you are connecting with past clients on a monthly, quarterly, semi-annual and annual basis. Keep messages simple and fun to inspire the most engagement. (*"Happy Birthday! Are you doing anything fun today?"*)
2. **Send thoughtful gifts.** Send out a short survey asking your clients what their favorite 'treats' are and include them in their closing gift.
3. **Delegate client contact to your team.** It is a misconception that clients need you to speak with them at all phases of the loan process. Train your team to prequalify clients and handle the details from contract to close.
4. **Create videos in advance to share updates with clients.** In order to successfully delegate and still have clients feel as if you are fully involved in the process, create and share a few key videos that include information about you and your team, a custom home loan strategy, and Rate Presentations.
5. **Be a master at 'one-timing'.** If a task is done more than once, create an automated process around it. Use templates for emails, social media graphics, presentations, video scripts and anything else that can be done over and over quickly and efficiently.
6. **Practice 'speed to lead'.** Connect with leads as soon as they come in and continue to reach out either via email, phone or text every 24 hours until they are converted to a client. Assign leads to your team members so they can manage the follow up process and report back to you.



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Key Takeaways (Continued):

7. **Create a Team Email and color code it.** Having a central email address that your entire team can access shows a team front, decreases the client's confusion and complaints about who's doing what and when, and also allows for a seamless transition if a team member leaves.
8. **Use an 'E-intro' template for Realtors to refer you.** Make it fast and easy for your Realtor partners to refer new clients to you by sending them an email template they can just cut and paste every time.
9. **Provide so much value, Realtors seek YOU out to work with you.** Build your credibility through consistently providing value in your email and social media campaigns. Become the trusted local expert by focusing on educating your clients and referral partners and showing up as your authentic self.
10. **Batch your social content.** The most common excuse for not posting more on social? Not enough time! Take one day per month and block out 3-4 hours to film all your videos, compile photos, graphics and content for your social channels. Do this monthly and your annual content calendar will be filled!
11. **Send extra love to your top Realtor partners.** If you have a handful of Realtors who consistently send you business, get to know their family, their children's birthdays and milestones and acknowledge them with a gift.
12. **Lean into Masterminds.** Consider hosting quarterly masterminds with your Realtors and other referral partners that offer solutions to current challenges in the market or strategies to help them grow their business.
13. **Make the most of Open Houses.** Especially when you are just starting out and looking to build your Realtor relationships, visit at least 2 open houses per month with the goal of securing a at least 1 meeting with a new Realtor.
14. **Control the narrative on rate conversations.** Be proactive about your approach and make it easy for the borrower to understand his options. Prepare a snapshot of different rate scenarios and email it with the subject line: *"Rate shopping complete! Pick your rate!"*