

"Roles and Expectations" for Mortgage.

- My clients should be in front of a lender before I show them homes.
- I need full amount approved, % of LTV and CLTV, seller contribution amount, and time needed to conformably close the deal.
- Notify me if a clients' status changes.
- Be consultative to get all motivated buyers approved with their needs in mind.
- Get loan docs. to title days before the closing.
- Be proactive on clearing conditions with your clients.
- Get all docs upfront, do not piecemeal information.
- Have Roles and Expectations, loyalty and communication conversation with each client.
- Get ready for Spanish speaking buyers.
- Get great credit repair guy, recommend a person whom will roll fees into your fees at closing.
- Contact the clients I send you proactively and regularly.
- Have touch program for pre-approved (not ready) clients Example: time, money and/or credit repair folks.
- Remind them of me in most contacts.
- Refer approved buyers to me.
- Be a problem solver not a blamer or ignorer.
- Learn from your mistakes.
- Hold your ancillary arms accountable. Push for appraisal and survey with title. Keep the ball moving towards closing.
- Be honest, overestimate costs and times but do not scare the client to death.
- Give client status on Mondays via email.
- Return calls within 2 time blocks.
- Treat you worst, poorest, least qualified person like your best with time, interest and respect.