



WINBYNOON®



DAILY DISCIPLINES

DO THESE. EVERY DAY. NO MATTER WHAT.



LEAD CALLS

Your first daily discipline is to call and follow up with your leads. Studies have shown that it takes an average of at least 6 calls to convert most leads, which is why you need to schedule and commit to these calls each day if you want to change your results.



DATABASE CALLS

Your other daily discipline is calling your borrowers who already applied with you to collect their documentation so you can get them pre-qualified. The goal is to get your borrowers out shopping for a home as fast as possible.



TARGET DAY COMMITMENTS



MONDAY

REVIEW, PLAN & LAUNCH

If you haven't already completed your Weekly Review for the prior week over the weekend, reviewing last week's activities and results should take priority on Monday. You cannot formulate a good plan for this week, without reviewing what happened last week. This is the day to launch your week for success by completing your Week Ahead Action Plan and your Ideal Week. Monday should also be spent taking care of anything that came in over the weekend.



TUESDAY

LOAN STATUS UPDATE CALLS

Tuesdays are spent calling your clients, the listing agent, the buyer's agent and any transaction coordinator with updates on loan status for all purchase loans in your pipeline. The best practice is to also include an emailed update to everyone as well, but don't skip the call!



WEDNESDAY

PRE-QUALIFIED CLIENT CALLS

Wednesdays are set aside to call your pre-qualified clients in order to protect your pipeline. Don't be the loan officer who makes the mistake of not keeping in contact with clients who are out looking for homes. Clients are less likely to shop around on the internet for information, if you consistently touch base with them.



THURSDAY

REFERRAL PARTNER CALLS

Thursdays are your referral partner call days. Most successful business partnerships are built on friendship. The key is to get to know your referral partners so that you both enjoy the conversation and make a connection. The bottom line is that if you don't call them, they probably won't call you (or refer you clients).



FRIDAY

ANNUAL REVIEW CALLS & WEEKLY WRAP-UP

Fridays are when you will make your Annual Review calls — an activity best done outside the hectic pace of the rest of the week. You will also focus on wrapping up any loose ends from the week, completing any commitments you made to your clients or referral partners, rescheduling any missed activities or appointments. The goal is for you to enjoy your weekend, knowing you completed everything that needed to get done. This is critical for you to rest and recharge.

YOUR DAILY DISCIPLINES & TARGET DAY COMMITMENTS ARE ESSENTIAL TO **WINNING BY NOON!**

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