

## Raving Referrals for Mortgage Pros

### The Proven Step-By-Step System for More Realtor Referrals

What are the top goals for your business for 2023?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

What do you want to be famous for in your business?

\_\_\_\_\_

What is your #1 source of new clients?

- Advertising
- Referrals from Patients
- Referrals from Other Professionals
- Reviews
- Social Media

\_\_\_\_\_

What is your annual marketing budget?

\_\_\_\_\_

What % of your annual revenue does that represent?

\_\_\_\_\_

What is your Annual Income Goal for this year?

\_\_\_\_\_

## REFERRAL SCORE QUIZ

On a scale of 1-10 where 1 is awful and 10 is awesome, how do you rate your business on:

1. How would your clients rate the **services** you provide? \_\_\_\_\_
2. How detailed is your **plan** for generating referrals? \_\_\_\_\_
3. How often do you **communicate** with your clients & Referral Partners? \_\_\_\_\_
4. How consistently do you **ask** people for referrals? \_\_\_\_\_
5. How consistent are you at **tracking** the referrals you give & receive? \_\_\_\_\_
6. How consistent are you at **thanking** people for referrals? \_\_\_\_\_
7. How consistent are you at **updating** people about referrals? \_\_\_\_\_
8. How consistent are you at **rewarding** people for referrals? \_\_\_\_\_
9. How consistent are you at **recognizing** people for referrals? \_\_\_\_\_
10. How consistent are you at **promoting** yourself? \_\_\_\_\_

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WHAT IS YOUR TOTAL REFERRAL SCORE \_\_\_\_\_

## WHAT IS YOUR LIFETIME CLIENT VALUE?

How much do you earn per loan closed? \_\_\_\_\_

How many loans do your clients average over 10 years? \_\_\_\_\_

How many referrals do clients send you on average? \_\_\_\_\_

## HOW WOULD YOU DEFINE YOUR PERFECT PROSPECT?

AGE \_\_\_\_\_

GENDER \_\_\_\_\_

STAGE \_\_\_\_\_

INCOME \_\_\_\_\_

LOCATION \_\_\_\_\_

OCCUPATION \_\_\_\_\_

## WHAT IS YOUR BANKCODE?



First Code

Second Code

Third Code

Last Code

Get your free personality report at [KnowYourCode.us](http://KnowYourCode.us)



## ELEVATE YOUR EXPERT INFLUENCE

How can you increase your influence and expert status?

|       |       |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

### WHO ARE YOUR BEST REFERRAL CHAMPIONS?

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### CREATING REFERRAL PARTNERSHIPS

What businesses and professionals might make the best referral partner for you?

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### BE A CHARITY CHAMPION

What will you do to expand your community impact through your business?

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**Enjoy Your Masterclass on How to Win More Realtor Referrals**

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