



# **Building and Leading a Great Production Team**

**Recruiting, Assessing and Mentorship Skills**

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**OriginationPro Mortgage School**  
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# Management LRAM

## Leadership—Recruiting—Assessment—Mentoring

### Building and Leading a Great Mortgage Team

#### Course Description

The course is part four of the Certified Mortgage Mentorship Curriculum and covers the skills necessary for managers, owners and mentors to effectively recruit and lead sales forces within the mortgage industry. The topics covered include assessment of candidates, recruiting plans and mentorship skills. Also covered are topics designed to make a producing manager's job easier through the use of synergy, as these top producers typically do not have the time necessary to effect recruiting plans due to the demands on their time.

#### Target Group

The course is designed to be a benefit for producing sales managers, owners of companies and those who would like to build a team and/or mentor loan officers. It will also benefit non-producing managers, as well as those who have a desire to further their careers by becoming a manager within the industry.

#### Course Objectives of the Course

The objective of the course is to help a manager become more effective while faced with several jobs, including recruiting, assessment, hiring, coaching and leading -- often times while carrying a full caseload themselves. The process will start with a critical first step, which is making sure they have the right candidates as the wrong hires assure that they will not be effective as a manager.

#### Course Format

The course is delivered online with narrated slide presentation. This will enable the student to move at their own pace which provides maximum flexibility. It is expected that the student could finish the course in two full days if they are dedicating an entire working day towards completion of the course.

#### Testing

There are quizzes throughout the material in order to reinforce the substance and the class culminates with a final exam. The course provides automatic feedback on quizzes and the final grade is also delivered immediately. A passing grade is 75%.

#### Additional Assignments

The course includes several assignments which must be completed and submitted for grading in order to complete the course. These assignments are designed to reinforce the material, as well as being able to delve deeper into certain topics.

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### Text

Students will receive an e-book which contains all course material. There is an option to purchase the print version of the course book as well. **The print text is scheduled to be available August 1, 2016.**

### Certification

The course is the fourth course of the four-part Certified Mortgage Mentorship Program. Students can achieve certification by completing and passing all three courses. Because of their position as mentors, Certified Mortgage Mentors must take all four courses to be certified. This course does not provide continuing education credit needed to retain your license.

### Author

Industry expert Dave Hershman is the author of the material presented in this course. Dave is the leading author in the industry with seven books and hundreds of articles published, including two by the Mortgage Bankers Association of America. As a loan officer, Dave closed over 550 loans in his first 18 months in the industry, including closing 60 in his 12th month. During his career, he has hired, trained and taught tens of thousands of loan officers and managers. In other words, Dave's material comes from the perspective of someone who has executed the expert differentiation model of success.

### Questions

Questions and technical issues can be address at any time by emailing [success@hershgroup.com](mailto:success@hershgroup.com). During business hours M-F on the east coast, students may call 1-800-581-5678; however, email questions typically are responded to more quickly.

### Course Evaluation

The students are encouraged to give feedback regarding the course material, delivery and structure at the end of the course.

## Course Outline

### Segment One: How We Arrived Here

### Segment Two: Leadership

### Segment Three: Formulating Objectives

- The Rules for Formulating Goals
- Objective Development
- Aligning Company Objectives to Hires
- Going Back to the Golden Rules of Management
- Firing The Wrong People

# The World of Mortgages

## Building and Leading a Great Mortgage Team

### Segment Four: Recruiting Your Team

- Increase Your Choices
- Targets
- Recruitment Tools
- Experienced Loan Officer Prospects
- The Recruitment Plan

### Segment Six: On Boarding

- Loan Officer Bonuses and Commission Plans
- Offer Letters and Agreements
- Loan Officer Responsibilities
- On Boarding and Orientation

### Segment Five: Assessing Candidates

- The Experience a Loan Officer Needs
- The Traits a Loan Officer Will Need to Succeed
- Interviewing Skills
- Checking References
- Challenges

### Segment Seven: Training and Coaching

- The Importance and State of Coaching
- The Training Our Loan Officers Need
- Coaching Loan Officers

### Segment Eight: Mentoring Loan Officers

- Who Makes the Best Mentor?
- A Sample Mentorship Program

## Contact Information

Email: [success@hershgroup.com](mailto:success@hershgroup.com) 1-800-581-5678

[www.originationpro.com](http://www.originationpro.com)