



Origination Sales and Marketing Skills

Business Building Success

February 2021

OriginationPro Mortgage School

1-800-581-5678

success@hershgroup.com



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Course Description

The course is part three of the Certified Mortgage Advisor Curriculum and features comprehensive coverage of the sales and marketing skills for loan officers within the mortgage industry. The topics covered include the traits necessary to succeed, sales skills and marketing concepts. The marketing segment includes a coverage of targets, tools and actions needed to set up a marketing and business plan. The sales skills includes the conversion of prospects, as well as a focus upon referral sources.

Target Group

The course is designed to be a benefit to new and experienced loan officers. This includes loan officers who are working for companies that provide leads, loan officers generating their own leads and those inside real estate offices or bank branches.

Objectives of the Course

The objective of the course is to demonstrate the skills and actions necessary for a loan officer to succeed as an inside sales representative or as a loan officer focusing upon referrals. The goal is to build upon the expertise learned in the previous two courses to market and sell as an expert mortgage advisor, rather than a sales person. This will include a focus upon uncovering the financial and emotional needs of a prospect, as well as filling these needs.

Course Format

The course is delivered online with a 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. Assignment completion is optional if not requesting certification.



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Text

Students will receive an e-book which contains all course material.

Certification

The course is the third course of the three-part Certified Mortgage Advisor Program. Students can achieve certification by completing and passing all three courses, as well as completing assignments. Loan officers and managers with a minimum of three years of experience that by-passed the World of Mortgages Course by passing the competency test, will start with the Advanced Mortgage Knowledge course before completing this course. This class 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 this expert differentiation model of success.

Questions

Questions and technical issues can be addressed at any time by emailing success@hershman-group.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: Goal Planning and Long-Term Goals

- Why goals are important
- What type of goals should be set?
- Overcoming Implementation Obstacles

Segment Two: What Will It Take to Succeed?

- The experience you will need
- The traits you will need to succeed
- Assessment and goals

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Course Three: Improving Our Sales Skills

- Creating a great first impression
- The needs assessment is the key to the sales process
- Asking questions is a skill
- Dealing with different personality types
- Asking for the business
- Moving to the close
- Overcoming call reluctance
- Assessing your sales and marketing needs with a funnel

Course Six: Micro-Spheres and Macro-Spheres

- The Micro-Sphere: Finding gold in your pipeline
- The Macro-Sphere: Inside real estate offices

Course Seven: Targeting Realtors®

- Who is a Realtor®?
- How do you meet Realtors®?
- Talking to real estate agents
- Realtor® objectives

Course Nine: The Tools

- Database marketing
- Skill tools
- Service tools
- Marketing tools

Course Four: The Laws of Marketing

- The basic laws of marketing
- The seven rules of maximum synergy marketing
- Building a marketing plan

Course Five: The Sphere Marketing Plan

- What is a sphere?
- Categorizing the sphere
- The sphere marketing plan

Course Eight: The Consumer

- The first time homebuyer
- Move-up buyers
- The second or vacation homebuyer
- The investment home buyer
- New home purchasers
- Refinance candidates
- Alternative mortgage referral sources
- FSBOs
- Previous customers
- The rate question

Course Ten: The Success Business Plan

Contact Information

Email: success@hershmanngroup.com 1-800-581-5678

www.OriginationPro.com