

LP 1 Checklist

TOP 3 DUTIES

1. Manage calendar and incoming calls
2. Manage Lead Tracker
3. TBD Calls

NOT TO DO – Get “stuck” working on a pre-approval

Initials **Daily:**

_____ Answer incoming calls

_____ Check Mike’s VM hourly if out of the office

_____ Manage Mike’s calendar (make sure Greatness Tracker will be full)

_____ Update any appointments in Mike’s calendar as necessary

_____ Confirm all appointments, except Loan Applications, 24 hours in advance

_____ Manage Daily Call List and have ready for Daily Team Meeting

_____ Manage Lead Tracker with new clients, call all leads back within 30 minutes (#1 priority)

_____ Calls all leads twice over two days, if still not reached update Realtor and give to Mike to call on day 3

_____ Maintain 35% conversion of lead to MPD

_____ Gather information to pre-approval new leads, schedule MPD, e-mail docs needed list to borrowers, update Realtor

_____ Input loan into Encompass, run credit, begin borrower pre-approval

_____ Input lead in ACT, create physical folder, schedule TOM marketing with Melanie

_____ Gather client docs, review with Lauren at daily Loan Committee

_____ Update client folder with client financial information

_____ Assign TBD calls with Mike at Daily Team Meeting, after calls update ACT notes and Realtors, schedule next call as necessary

_____ Make Mike do Daily POWER Hour

Initials **Weekly:**

_____ Address handwritten note for new referrals and face to face meetings, update fields in ACT, Mike to write a minimum of 10 per week

_____ Print Tuesday Status Update list every Tuesday for Mike

_____ Friday manage gift campaign, Balloons and Cupcakes to Top 40 Realtors, Sheri’s Berries to Top 40 Past Clients and Favorite People

_____ Friday Whale Drip Campaign mail to Realtors

Initials **Monthly:**

_____ Help coordinate monthly Realtor events – one Lunch & Learn and one Happy Hour

_____ Mail Post Closing Shhh Postcard 1st Friday of every month

_____ Print prior month closed loan call list for Mike, 2nd Friday of the month

_____ Work with Mike to mail monthly EOS and / or LFTH

_____ Update Lead Tracker for Mike CORE Homework

Initials **Quarterly:**

_____ Help plan Realtor/client parties (4 per year)

_____ Bring ideas to SWOT Meeting