

Mike Smalley Team Flow Chart

Team Lead – Mike

Top Responsibilities

- 1 – Build and maintain referral relationships
- 2 – Consult with borrowers, sell the team
- 3 – Lead and Coach Loan Officers
- 4 – Lead the Mike Smalley Team

Top Measurements

- 1 – Generate 125 leads a month
- 2 – Close 28 loans a month, 8 TBD calls a day
- 3 – Region averages 1.0 million per producing LO
- 4 – Daily team meetings and weekly trainings

LP I (Marketing) - Jenni

Top Responsibilities

- 1 – Manage Lead Tracker
- 2 – WOW service to Realtor partners
- 3 – Review TBD's with Mike every morning at team meeting
- 4 – Manage Realtor appointments

Top Measurements

- 1 – 35% conversion of lead to Appointment
- 2 – Realtor updates and TOM Drip for every lead
- 3 – 12 TBD Calls a day
- 4 – Make sure Mike has 2 Realtor one on one's a week

LP 1 (Admin) – Liz

Top Responsibilities

- 1 – Manage Lead Tracker
- 2 – WOW service to Realtor partners
- 3 – Review TBD's with Mike every morning at team meeting
- 4 – Manage marketing campaigns

Top Measurements

- 1 – 35% conversion of lead to Appointment
- 2 – Realtor updates and TOM Drip for every lead
- 3 – 12 TBD Calls a day
- 4 – Birthdays and special gifts are sent weekly, Lunch & Learns coordinated, Tuesday/Thursday Realtor drip campaigns mailed

LP II (Captain) – Renee

Top Responsibilities

- 1 – Solve 90% of in process loan problems
- 2 - Manage lead pre-approval and follow up
- 3 – Prepare loan disclosures for new applications
- 4 – Take loans from contract to closing

Top Measurements

- 1 – Be the teams go to problem solver, keep Mike out of problem loans
- 2 – 6 TBD calls a day
- 3 – Disclose 10 loans a month
- 4 – Close 8 loans a month

LP II - Lauren

Top Responsibilities

- 1 – Manage lead pre-approval and follow up
- 2 – Prepare loan disclosures for new applications
- 3 – Take loans from contract to closing
- 4 – WOW service to Realtor partners

Top Measurements

- 1 – 6 TBD calls a day
- 2 – Disclose 12 loans a month
- 3 – Close 10 loans a month
- 4 – Tuesday Status Updates

LP II - Tammie

Top Responsibilities

- 1 – Manage lead pre-approval and follow up
- 2 – Prepare loan disclosures for new applications
- 3 – Take loans from contract to closing
- 4 – WOW service to Realtor partners

Top Measurements

- 1 – 6 TBD calls a day
- 2 – Disclose 12 loans a month
- 3 – Close 10 loans a month
- 4 – Tuesday Status Updates