



Empowering top loan officers to accelerate their success with proven key strategies of high performers



What will you gain?

ELITE™ empowers top loan officers to elevate their already outstanding results by learning to leverage their success to acquire, convert and retain clients and referral sources.

ELITE will increase top loan officer production through:

- Refine their current tactics and consider new strategies for acquiring leads
- Gain an understanding of how to maximize lead conversion
- Apply best practices of superstars to improve retention
- Develop a tactical approach to leveraging success to improve their business



What's included?

ELITE consists of four 90-minute, "live" webinars. This program is conducted every other week along with required assignments to increase a top loan officer's production. XINNIX Performance Specialists provide guidance on implementation of new business practices throughout the program.

ELITE attendees receive over 20 valuable business tools that they can use after the classes are complete to continue increasing production including:

- Production Goals Worksheet
- Key Targets™ Worksheet
- Personal and Professional Profile Worksheets
- Personal Lead Conversion Analysis Worksheet
- Lost Documentation Source List
- Scripting for Testimonial Email and Asking for Referrals
- Sample Assistant Scripts
- LO/Processor Meeting Agenda
- "Who is Your Loan Officer?" Worksheet
- "Fields of Importance" Worksheet
- "Targeting the Workplace" Questionnaire

... and many more!



Intended Audience

- Top loan officers

How does it work?

- Four 90-minute, live webinars led by XINNIX Performance Specialists
- Accountability to XINNIX Performance Specialists through bi-weekly assignments
- Comprehensive handout with each class
- Valuable business tools for immediate impact
- Key activities for business development



Course Agenda

This training enables top loan officers to discover how their already impressive success can benefit them to even more production. Each session is packed with practical strategies and tactics to help top loan officers acquire, convert and retain customers and referral partners. Participants will also learn how to leverage existing tools such as their database and team members to positively impact their business.

Aquisition Strategy

- Know the 4 major strategies of a highly successful business
- Be able to identify and prioritize lead acquisition strategies
- Have a lead strategy process to refine success
- Gain a strategic plan to effectively grow business

Conversion Strategy

- Execute an optimal response strategy to elevate their lead conversion
- Execute on a proven sales process to maximize lead conversion
- Have the follow-up strategy that converts leads into customers
- Be able to delegate and leverage tasks for greater business impact

Retention Strategy

- Understand the value of a customer for a large increase in repeat business
- Be able to define a “perfect” application
- Master a powerful pipeline process
- Gain a strategy for post closing for repeat business long-term

Leverage Strategy

- Leverage current Key Targets™ for additional business
- Use every application/closing as an opportunity for more business
- Utilize database more effectively for points of contact
- Leverage an assistant to improve production and customer service

Leverage your already stellar success with strategies and tactics to increase your production!

Identify and utilize existing opportunities while learning new activities to acquire, convert and retain customers and referral sources.

Leverage your success with ELITE.



What people are saying

“As a top producer, I am always looking for ways to be better. This class is a no-brainer for anyone looking to do the same and reach the next level. Thank you XINNIX.”

– L.Johnson
Mortgage Loan Originator

“Everything XINNIX provides is always top notch. I always walk away from training not only motivated, inspired, but most importantly, with tangible items to implement the proven practices and skills she has shared!”

– G.Collier
Mortgage Loan Originator

“Best training company I have been trained by in 26 years!”

– J.Tiedeman
Sales Manager

