

# **LEAD CONVERSION™**

Providing loan officers with a proven sales process and precise techniques to dramatically increase lead conversion



## What will you gain?

As a loan officer you need to maximize the potential in every lead you receive. LEAD CONVERSION™ shows you how, with a sales process that is clear, concise, repeatable, measurable – and most importantly, proven to work.

Loan officers experience a lift in lead conversion and loan pull-through by learning how to:

- Develop a strategic lead contact strategy
- Identify buying signs and emotional hot buttons
- Utilize multiple closing techniques to secure the customer
- Implement a process to confidently speak to customers
- Present options to customers in an easy to understand format



## What's included?

LEAD CONVERSION consists of two, 90-minute live, instructor-led webinars or one full 8-hour in person workshop that demonstrate how to respond to leads faster and more effectively, which boosts confidence and ultimately increases lead conversion. The interactive sessions are delivered by previous top producers, and include handouts that students follow and complete during the training – ensuring engagement, comprehension, and retention.

In addition to the comprehensive training, attendees receive valuable post-class business tools at no additional cost.

Managers of enrolled students receive a guide that enables them to:

- Reinforce what the loan officer has learned
- Ensure higher retention of the material
- Improve execution of new disciplines



### Intended Audience

- Retail loan officers
- Call center loan officers

### How does it work?

- Two, 90-minute live instructor-led webinars
- Optional full day 8-hour in person workshop format
- Handout with each class
- Variety of post-class business tools
- Manager's guide included



# Course Agenda

## Class 1

Loan officers will be empowered with strategies and techniques to build rapport with customers by discovering their motivation to buy and confidently handle objections.

During this power packed class, a loan officer will:

- Implement a process to eliminate fears and confidently speak to clients
- Build rapport with customers on each call
- Effectively open a call and answer common client questions
- Discover client needs and emotional “hot” buttons as reasons to buy
- Utilize foreshadowing effectively to uncover hidden objections
- Uncover client’s hidden objections and handle them effectively

## Class 2

Loan officers will learn how to identify buying signs and utilize various closing techniques to increase conversion rates.

Upon completion of this final class, a loan officer will:

- Identify buying signs and learn how to effectively close
- Implement an active listening strategy to better understand customers
- Deliver all details of the transaction in a favorable light
- Utilize several different closing techniques on one call to secure the customer
- Use open-ended questions effectively to gain trust from customers

\*To reinforce best practices, continued execution, and measure results after the one-day workshop, all attendees participate in two group accountability conference calls with XINNIX within 90 days of the session.

Maximize the value in every lead, with higher conversion rates and increased, measurable production. LEAD CONVERSION shows you how. *Don't miss this opportunity for growth!*

\* applies to in-person workshop only



### What people are saying

*“Smart, hardworking loan officers who are not getting the results they feel they should need to take this program. It will give you the structure and the plan you need to maximize your results.”*

– D. Henry  
Regional Director



LEAD CONVERSION attendees also receive valuable post-class business tools including:

- Personal lead conversion analysis worksheet
- Common buying signs guide
- Lead conversion sales process
- Comprehensive practice assignments

... and many more

