



Loan Officer's Practical Guide to Marketing: Developing a Loan Officer Marketing Plan

Thomas A. Morgan

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The Loan Officer's Practical Guide to Selling and Marketing Mortgage Services - Developing a Loan Officer Marketing Plan You know how to make a mortgage loan, but how do you go to originate one? This product teaches you how to understand the needs of your customer or referral source - and then solve them. For each situation, there are materials and tools for addressing solutions. The reader learns the basic job of a loan officer from the sales perspective. Understand how to source loans from: Real Estate Agents Home Builders Property Managers Financial Planners Investment Advisers Accountants Attorneys Understanding the primary sources for business, the new originator is initiated into the process of identifying a territory and the markets within that territory. A workbook assists in the planning of strategy. Tools, letters, presentations, flyers, and other resources are provided to help work these sources. Other marketing tools include Open House Spreadsheets in Excel, Rate sheets, Application Kits, Forms for Complete Applications, Marketing and Promotional Materials, Product Discussion Sheet, Customize-able Marketing Letters to Realtors, Builders, Accountants and Financial Advisers. Similar, but less robust, products are sold for nearly 5 times the cost. All of our products are designed to give the highest possible value.

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