

Lead Referral Form – Grant Porter

Mobile Access



Desktop Access

<https://go.onetrusthomeloans.com/bluebird-referral-grant.html>

WHY should I use this form to submit a referral?

- 1) Speed of referral
- 2) Auto email connection of Buyer, Loan Officer and Realtor
- 3) Increased conversion!



Grant Porter
Senior Mortgage Loan Originator
NMLS # 5455

MOBILE (208) 371-1712 **TEL** (208) 314-0803
gporter@bluebirdhl.com
616 S Americana Blvd, Boise, ID 83702

My Website [Apply Now!](#)



RE Agents

What to do & When to do it With each part of your business

Monday

Top 50 VIP's (Favorite People)

1. Call 12 every Monday
2. 1 lunch per week
3. Birthday program
 - Cards
 - Food
 - Gifts
4. Categorize as
 - A, B, or C
5. Send video Letter from the Heart (LOTH)
6. 1 Happy hour/month

Tuesday

Status Calls

1. Sellers in process
2. Buyers and sellers under contract

Wednesday

Hot Leads and

Old Leads

1. Close for an appointment
2. Send EOS mailer every month
3. Email monthly video about the market

Thursday

Top 50 Past Clients 400 Past Client Database

1. 50 favorite past clients
 - a. Call 12 per week
 - b. Birthday program
 - c. Invite to monthly happy hour and annual client appreciation event
 - d. Monthly LOTH
2. 400 past clients database
 - a. Call 1 letter per week= 2 touches per year
 - b. Birthday program
 - c. Invite to annual client appreciation event
 - d. Monthly LOTH

Friday

Cold Calling Day - New Business People & Builders

1. Call 10 business people every Friday and 2 builders
2. Meet 2 per month
3. Add to Evidence of Success (EOS) mail and video email list
4. Invite to Happy Hour
5. Attend 2 business events per month

VISUAL WHEEL

MONEY

WORK

SELF

FRIENDS

FAMILY

LOVE
LIFE

SPIRITUALITY

Your Biggest AHA:
