

#### **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!



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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
  - <u>Cards</u>
  - 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
- Buyers and sellers under contract

### **Wednesday**

#### **Hot Leads and**

#### **Old Leads**

- 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
- 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

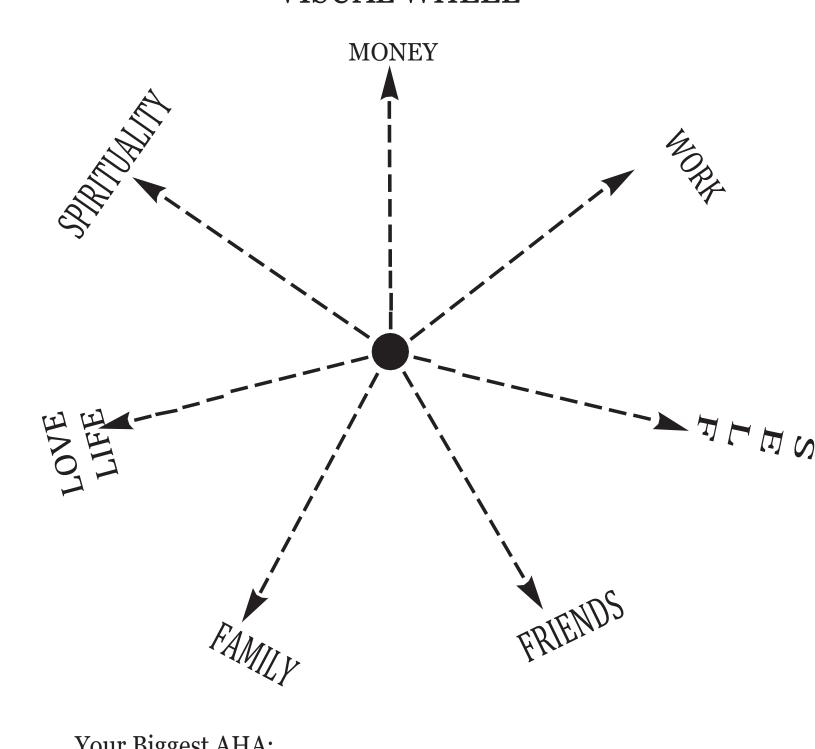
#### **Friday**

#### **Cold Calling Day -**

# New Business People & Builders

- Call 10 business people every Friday and 2 builders
- 2. Meet 2 per month
- 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



Tour Diggest min.		