

# THE ULTIMATE GUIDE TO HOSTING REALTOR® CLASSES



HOW TO QUICKLY AND EASILY  
CAPTURE MORE AGENTS, BUILD TRUST  
AND GET MORE REFERRALS



MORTGAGE  
MARKETING  
INSTITUTE



# MORTGAGE MARKETING INSTITUTE PRESENTS



## POWERFUL PRESENTATIONS FOR MORTGAGE LOAN OFFICERS

The Ultimate Guide to Hosting REALTOR® Classes.  
How to Quickly and Easily Capture More Agents, Build  
Trust and Get More Referrals.

*A Sample Lesson From...*

*“Powerful Presentations”  
found inside “The Master Class”  
members-only community*

Winning referrals and loyalty from REALTORS® is consistently ranked among the most challenging tasks for Mortgage Loan Originators to overcome.

The problem often stems from Loan Officers repeating the traditional failed patterns of approaching agents and rarely considering that your success or failure with agent prospecting is largely a function of your approach.

You never get a second chance to make a good first impression.

**Working with agents can be enjoyable and rewarding if you enter the relationship with proper positioning and balance of control.**

Before you can influence someone, you have to know what influences him or her. My hope is this guide will inspire and equip you with a renewed mindset and a more effective strategy for quickly building profitable and win-win relationships with agents.

So let's begin. The first thing you need to succeed with agents is to...

# 1

## UNDERSTAND THE MINDSET OF REAL ESTATE AGENTS

How often do you hear agents tell you the following?

*"I already work with a lender"*

*"I'm a listing agent "*

*"I have an in-house lender"*

*"My buyers are all cash"*

*"Blah, blah, blah..."*

Why do agents respond to you like that?



Agents respond with these familiar “reflex” responses for three core reasons.

1)They don’t know you

2)They don’t trust you

3)You seem like every other Loan Officer

If you’re approaching agents the same way other Loan Officers are, you’re starting from a negative position. Agents already don’t trust Loan Officers because they’ve been lied to before.

They’ve heard the promises of “great rates” “we close on-time” and other platitudes. Those are empty promises made by every Loan Officer in your market. More often than not, those promises are not kept.

Promising “great rates” and “we close on-time” is nothing but white noise to Real Estate Agents

To break the pattern of agents saying, “I already have a lender” you need to change your approach.

How do you break the pattern?  
Change the model. Flip the funnel. Get agents to see you through a different lens and start a new conversation.

# 2

## THE TRADITIONAL SALES MODEL IS BROKEN.

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The traditional sales model reliant on cold calling, interruption marketing and “all about me,” “we’re the best” is broken and dying



### How's that been working for you?

Engaging solely in outbound sales activities like cold-calling, SPAM emails, attending broker previews and cold open houses, puts you at a disadvantaged position.

### Why?

With no prior engagement there's no basis to evaluate you on so you're relegated to the "same as" category of being like all other Loan Officers. You're starting at a deficit. Not good!

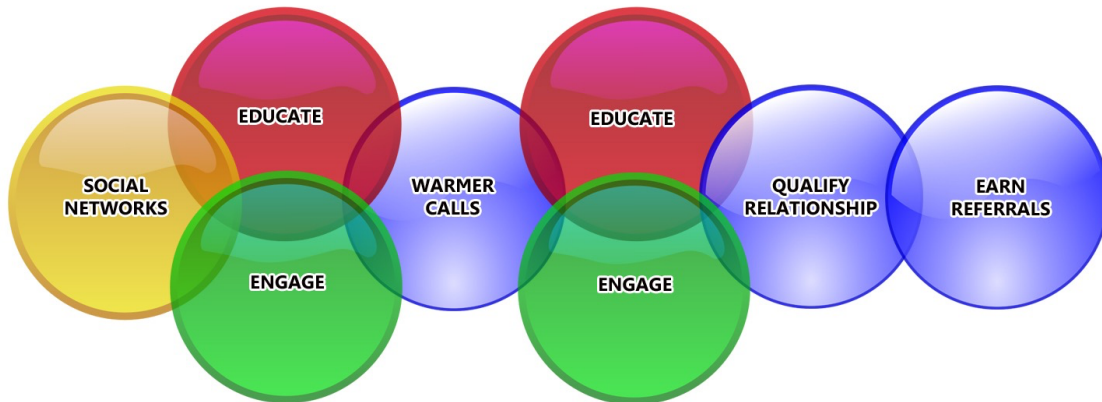
Winning the trust and loyalty of agents does not happen randomly. It begins with purposeful positioning of your personal brand (YOU) and relevance to each agent you interact with.

# 3

## THE NEW RULES OF SALES & MARKETING.

The modern sales and referral process is centered on engagement and sharing of relevant content that informs, educates, builds trust and ultimately leads to a conversation.

### THE MODERN REFERRAL PROCESS



To win the attention, trust and referrals of agents, you must flip the traditional paradigm of “Loan Officer chases Agent” to a new model of “Loan Officer Engages, Educates, and Adds Value.”

### How Do You Add Real Value to Real Estate Agents?

Simply put, you start with a genuine interest in understanding the business related issues agents are struggling with and seek to provide helpful content, ideas and solutions.

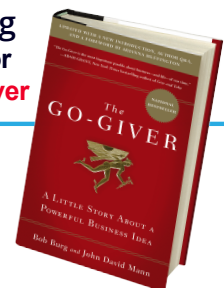
You build your platform to share relevant content with agents on-line and off-line to build awareness, trust and value.

#### THE LAW OF COMPENSATION

"Your income is determined by how many people you serve and how well

*YOU SERVE THEM"*

Bob Burg  
Co-Author  
**The Go-Giver**



# 4

## DO YOU HAVE A PROVEN SYSTEM OR DO YOU WING IT?

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When surveyed, 75% of Loan Officers say they're winging it. Most Loan Officers are leaving their success to chance. It's no wonder you get frustrated and burnt out on the hamster wheel, chasing agents with little success.

Michael E Gerber; is the best-selling author of The E-Myth and called "The World's #1 Small Business Guru by Inc. Magazine. After working with over three million business owners he discovered that for any business to realize its full potential, it must master Three Core Systems



What's your system for generating conversations with potential agent partners every month? In today's market you need more agents than ever to sustain a consistent stream of referrals.

Most Loan Officers process is random and the equivalent to playing whack-a-mole.

94% of All Failure is a  
Result of the System...  
Not People  
W. Edwards Deming

# 5

# WHY TEACHING AGENT CLASSES AND WORKSHOPS ROCKS!

Okay, we've established that in order to succeed in capturing more agents, you have to change the game you've been playing.

No more traditional sales model. You must adapt to the new rules of sales and marketing and engage agents with value-added, relevant content.

## Why Agent Classes & Workshops Rock

**Positioning:** Hosting agent classes and workshops puts YOU in the power position. You've now flipped the funnel because agents are coming to YOU instead of you chasing them. It's a system!

You establish immediate authority stand out from the noise and you're instantly perceived as unique and successful. You're not asking for a loan (yet) you're being a Go-Giver!

**Scale Reach:** In order to build a stable base of productive agents, you need to sift and sort through large numbers. Hosting agent classes shortens the usual timeline of meeting agents by chance or individually over coffee. More agents in less time means you'll improve your conversion rate and quickly build your awareness among your local agents.

**Impact (In-Person):** Social Media and online marketing is an important part of your overall strategy but it will never replace the impact of meeting people face-to-face.



Being in-person vs. online allows you to build trust faster, develop more rapport and "likeability" which leads to getting referrals faster and building more loyalty.

## Bonus Reason: Top Producers Host Agent Classes

Take a look at the Scotsman's Guide Top 200 Originators or other lists ranking of the nations top producing Loan Officers. There's a good reason a large percentage of those lists rank hosting agent classes and workshops among their most effective forms of marketing.

# 6

## MARKETING & PROMOTION: GETTING AGENTS BUTTS IN SEATS.

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The question now is how are you going to fill the room with agents eager to hear your presentation?

### Five Steps to Hosting a Successful Agent Event

#### 1) CHOOSE A COMPELLING TOPIC:

Don't overdo it with mortgage topics. Focus on business related topics from Digital Marketing and Social Media to Database Marketing. Agents are hungry for good content related to their specific business challenges.

#### 2) PARTNER WITH AFFILIATES:

Teaming up with your local Title, Escrow, Home Warranty and Insurance reps is a great way to spread the word and share any related costs for lunch or coffee.

#### 3) MULTI-CHANNEL MARKETING:

Use printed event flyers, promote on Social Media, nurture with Email, and share your event at Broker Previews, Board of REALTORS® and agent office meetings.

#### 4) LEVERAGE TECHNOLOGY:

Use the free version of Eventbrite to capture and manage RSVP's, issue tickets to get in and to send reminders and print your attendee list for check-in.

#### 5) THE F WORD:

Expect a 30% no show rate. To maximize attendance, follow-up is critical. Make at least three confirmation calls. Once at time of RSVP and twice leading up to the event to minimize drop-off. Make another call after your class to thank them for coming and qualify the potential for a meeting.

## WANT MORE IN-DEPTH TRAINING?

Get your all access pass to Powerful Presentations Mini-Course that includes:

- Video modules that give you a step-by-step system to get you started hosting agent classes
- A blueprint for the hot topics that get agents butts in seats!
- Customized worksheets and templates to create your own successful Powerful Presentations
- Bonus: Audio downloads featuring exclusive interviews with top producing loan officers sharing best practices for hosting agent classes

Just Visit [GetPowerfulPresentations.com/Mini](https://GetPowerfulPresentations.com/Mini) to Sign Up Today