



## **2018 IMA Fall Conference**

### *Round Table Activity*

#### **Questions #1 – What are you doing right now to gain business?**

- First-Time Homebuyer Seminars
- Education opportunities
- New Agent Training
- Association Memberships – boards & committees
- Pop-by's: delivering treats to agent, lunch with realtors, take realtors for coffee & lunch
- Back to basics – more meetings/visits with realtors
- Attend closing
- Reaching out to attorneys, financial planners
- Providing gift bags
- Research people before meeting. Stay personal. Google search prior to meeting
- Written notes for past clients – after closing and one year later
- Listening agent contacts – following with and updating
- Taking time out of each day to touch base with past clients, referral partners, realtors – trying to give each contact a personal touch.
- Asking for referrals at closing
- Newsletters to past clients
- Google alerts – gmail account set-up
- Working more social media efforts – Facebook, LinkedIn, Etc.
- Implement marketing ideas from Fall IMA conference
- Avoid rate selling
- Create honest expectations
- Developing new products
- Be present and truly listening
- Integrating loan processor with realtors – helping order home inspections, daily tasks, etc.
- Meeting with current customers to cross-selling
- Need to do 80% of your work before issuing a credit approval letter
- Financial sheets for current homes in market
- More community involvement in groups and events that aren't necessarily bank sponsored
- Snappy hour – offering head shots to agents as a networking event
- Focusing on more consumer direct efforts to get ahead on the big box stores

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### **Questions #2 – What are you planning to chance/improve/start doing to grow your business in 2019?**

- Implement/improve social media – professional LinkedIn, Facebook, Twitter, Videos on social media (bombom.com)
- Daily/weekly podcasts
- Handwritten thank you's
- Being present and promoting yourself. Pound the pavement
- Focus on niche – what we do best
- Do what you can to be different than your competitors; be unique
- Tailoring an experience, personal touch, follow up
- Personal touches to referral sources and clients – new baby, cubs tickets, fav restaurant
- Goal of numbers of events to go to for 2019, plan marketing for the year
- Educational seminar to realtors
- Start attending chamber events/more involved in the community and be visible
- Change language – no more “no problem,” “no worries”
- Be intentional; regarding communication
- Identifying new products, implement, differentiate
- Improve work flows to free up originators with more selling time available, more efficient in daily tasks, time management
- Check email during specific times of day
- Keeping the borrower informed
- Stop by open houses to give coffee, water to realtors
- Get on realtors and builders committees
- Attend the mortgage closings
- Focus on not contact 100%, but focus on quality referral sources that you can give quality attention to
- Being diverse with who you ask business from (attorneys, financial planners)
- Partner with the financial institution
- Building relationships with your own bank partners