



Brad Rice Presents:

90-DAY BLUEPRINT Quick-Start Program

Building a Foundation for Your

Loan Origination Business

90-Day Blueprint



| Introduction

Welcome to the 90-Day Blueprint Quick-Start Program designed to help you build a solid foundation for your mortgage loan origination business. This program focuses on creating and maintaining a comprehensive database in your CRM, which will serve as the central hub for your business for years to come. Your database will include contact information from everyone who knows you by name or face, and it will be critical for networking, customer management, and business growth.

PHASE 1:

Setting Up Your CRM and Daily Routine **(Days 1-30)**



CRM Setup:

Choose a CRM that suits your needs and set it up to organize contacts, track interactions, and store important information.



Daily Routine:

- a.) Spend at least 3 hours per day going through every source you have for contacts.
- b.) Enter complete contact information into your CRM.
- c.) Reach out to contacts via phone, text, email, or social media to update their information and let them know about your new venture.
- d.) Update mobile numbers, email addresses, physical addresses, and any other relevant information.
- e.) Enter note on anything specific to them that you can remember or that they mention. Family, vacation, hobbies, etc.
 - i. *You will review your notes and remind them of your last conversation every time you speak. They will always think they are the most important client to you!*



Utilize Social Media:

Go through every contact in your cell phone, Facebook, Instagram, LinkedIn, and other social media accounts. Reach out using various communication methods to collect contact information (If you don't have a phone number, then use email, Facebook messenger, DM's, etc.).

- a.) Calling is the number one preferred method. Make a connection!



PHASE 2:

Expanding Your Network (**Days 31-60**)



Local Networking:

a.) Inform everyone you meet about your profession and collect their contact information for your CRM.

i. Examples: Your dry cleaner, hair salon, veterinarian, etc. everyone you do business with should do business with you!

b.) Carry business cards and share them whenever you have the opportunity.

i. It's okay to use an electronic business card too, but physicals are a must.



Community Engagement:

a.) Attend local events and engage with community members.

b.) Join local business groups and associations to expand your network.

i. YMCA, church, chamber of commerce, city volunteering.

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PHASE 3:

Engaging and Maintaining Relationships **(Days 61-90)**



Regular Follow-Ups:

- a.) Schedule regular follow-ups with contacts to maintain relationships.
 - i. *Calls and texts are best...must be personal.*
- b.) Provide valuable information related to real estate trends and rates.
 - i. *Email and physical mailers (postcards bi-monthly).*



Database Management:

- a.) Keep your CRM updated with notes from conversations, records of emails, texts, and mailers.
- b.) Retain current interest rates and loan balances for each contact and each property they own.

Conclusion:

By diligently following this 90-day blueprint and investing time in building and maintaining your database, you will lay a strong foundation for your mortgage loan origination business. Remember, this is not just about work; it's about building relationships and providing value to your contacts. At the end of this program, you'll not only have a robust database but also a network of potential clients and referral sources that will benefit your business for years to come.



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