CASE STUDY

When the industry moved from a refinance to a purchase market, my company was not prepared. We just setup our first mortgage department two years prior and because we cut our teeth on refinances, my loan officers had limited experience in building purchase relationships and systems to guide their day with activities that produce results.

JOHN BARRY
VP OF REAL ESTATE LENDING
Kitsap Credit Union

WHY 90-DAY SALES?

We spent a significant amount of time researching various mortgage coaches. Many spend time on scripting or simply prospecting for the next deal. What makes 90 Day Sales Manager different is how Dr. Bruce presents a complete system that both a rookie Loan Officer or an experienced Loan Officer can integrate into their daily activities and see a reasonable increase in business and exposure in the market. From time blocking, a personal "Opportunity Statement", weekly planning to a specific systematic action campaign; Dr. Bruce brings a "fire hose" of actionable items to really super charge a mortgage sales department.

KITSAP CREDIT UNION

OUR SALES TEAM IS...

1. Rowing in the same direction.

We now speak the same language thanks to the selling system and 5-habits of credit unions..

2. Confident in their prospecting.

Our sales meetings are purposeful, organized and provide value to our members and referral partners.

3. More efficient with their database.

We are more comfortable with how to leverage and use our CRM in addition to actively growing it.

OUR SELF-SOURCED BUSINESS HAS INCREASED BY 25%.

LOAN OFFICER

TENDER BLUE

Loan Officer

When I started 90-Day Sales I was at a loss while transitioning from a traditional mortgage bank to a credit union. It was a completely different environment, and the department was in the it's infancy. With Dr. Bruce's tailored coaching for credit unions, I found the structure and accountability I desperately wanted. My skepticism from past trainings 'to make me the best in business' was swiftly replaced by a 40% boost in my volume. His approach is not only realistic but truly transforms the life of a loan officer.