

CASE STUDY

In 2018, I started working with Dr. Bruce after briefly leaving the credit union space for an IMB. Through his coaching, I realized the credit union culture was where I belonged. Upon returning to Elevations, I quickly restarted my business and achieved over \$140 million in production in 2021, while maintaining a focus on purchase business.



IAN BENNETT
LOAN OFFICER | COLORADO

OBJECTIVES

Initially, I joined this coaching program with the intention of having my team participate. However, I soon recognized the importance of the 5 habits as the foundation and decided to focus on implementing them in my own business.

SOLUTION

Habit 1 (the opportunity statement) had a life-changing impact on me personally and professionally. This training exercise helped me package and now sell my true value as a credit union loan officer compared to peers. The first habit alone is worth the price of admission, and is a game-changer for initial member or referral partner meetings.

BENEFITS

1) Sales

We have tightened up our systems and taken the guesswork out of our prospecting and follow-up specific to referral partner business.

2) Service

Implementing the 90-day onboarding process has helped us earn one of the top net promoter scores at the company.

3) Mindset

90-Day Sales Manager isn't something you do once. It's a lifestyle change. I go through it every 90-days to continue strengthening my habits as a loan officer.



MANAGER



**CAMERON
WHITE-FORD**
VP MORTGAGE SALES

Mortgage sales can be approached from an impossible number of angles. 90-Day Sales Manager has helped Ian eliminate all that noise and allowed him to focus on the five things top producers universally value. In a business that changes every year, being able to always focus on the right things separates the best, Ian, from the rest.

CASE STUDY

I began working with Dr. Bruce on January of 2023. I left my business in Florida for over 10 years and came to Colorado and joined Elevations in 2022. I went from producing over \$100 million to a state I didn't know anyone and started over from ground zero. In just the 3 quarters I have implemented this program, I have already quadrupled my production from 2022. It completely takes the guesswork out of prospecting and follow-up specific to referral partner business.



ANDREW LOYED

LOAN OFFICER | COLORADO

OBJECTIVES

I have continually believed that coaching and value are truly the pillar in building any business, especially in the financial sector. From the first time I met Dr. Bruce I realized his passion is unmistakable and the 5-habits in his program are the groundwork needed to consistently perform at a high level.

SOLUTION

Although these 5-habits work together in unison, Habit #1 (the opportunity statement) has really changed the way I look at business and life overall. In truly evaluating this statement I realized what my mission really was in life and it categorically made me realize that alignment with business partners and organizationally is much more important than I ever thought.

BENEFITS

1) Sales

I have applied these systems to my daily routine and no longer have to worry about what to do or when to do it.

2) Service

Executing this 90-day cycle 4 times throughout the year has allowed me to not only retain my existing partners but also bring on new partners with the highest level of success.

3) Mindset

90-day Sales has not only kept me on track for my goals but also given me the confidence to lead conversations with new partners and make me the most prepared for these meetings that I have ever been.



MANAGER

JESSICA ROBINSON

SALES MANAGER



I have worked with Andrew since he first started at Elevations and his growth has been exponential. I have seen growth in all aspects but mainly in his drive, motivation, organizational skills, and communication. His ability to connect with individuals and his fierce competitive nature have definitely helped in his success as his numbers have quadrupled in the past year. If I had to describe Andrew in two words it would be "Beast Mode". That is where he lives and that mindset is what gives him an advantage over his competitors.