

CASE STUDY

Truity Credit Union's strong reputation has always ensured steady business. As challenges arose and we expanded into new markets, I saw the need to equip our team with a proven system. 90-Day Sales offers a comprehensive approach that experienced Loan Officers can seamlessly integrate, boosting business.



ANDREW HARRIS

VP OF MORTGAGE

OBJECTIVES

I wanted to put in place a system that allowed our Team to utilize the same process and tools to reach our members and business partners consistently. I also wanted to have a system that made us more efficient and that gave me the ability to track work flow which allows me to encourage and coach our team.

SOLUTION

Not only did 90-Day Sales help me in reaching my objectives, but Dr. Bruce showed the team how to utilize the 4-hour work day which gave our team a first day energy.

BENEFITS

Purchase Focused

We've prioritized the purchase market and nurtured business partner relationships for years. However, our team lacked a system to manage these relationships and organize result-driven daily activities.

Easy to Use Strategies

Dr. Bruce provided actionable strategies, rejuvenating our mortgage sales team and bolstering confidence among our veteran officers.

Database Management

Our sales team now confidently prospects, using Dr. Bruce's follow-up system to engage with our Pre-Approvals and business partners through an organized database.



LOAN OFFICER

**BECKI
GAILEY**

Loan Officer



The 90-Day Sales Manager training transformed my approach to business. Before, I lacked structure and was unaware of my chaos. Dr. Bruce not only boosted my confidence but also held me accountable. His opportunity statement distinguishes us from other lenders by immediately sharing our values. His emphasis on discipline, consistency, and using his CRM system revolutionized how I manage and engage with my database, improving my tracking of referrals.

CASE STUDY

I started working with Dr. Bruce at the beginning of 2023. I have worked in both banks and credit unions. When I started at Truity Credit Union, I realized I found a home. My mortgage production continues to grow each year.



MALLORY BENNE

Loan Officer

OBJECTIVES

Initially, I joined Dr. Bruce's coaching program not knowing what to expect. I continued to grow from the 5 habits of the foundation of the program that I continue to use in my daily personal and business life today

SOLUTION

My business structure is different, as a National Loan Officer. There are several pieces to the 5 habits that has impacted my career. The opportunity statement has help how I communicate not only with prospective realtors but following up with my prospects. This brings me to Follow-Up System. With the opportunity statement, the follow-up is so much easier to fit in to my prospecting.

BENEFITS

1) Sales

I have been more confident with myself when talking to members and referral partners. This program has taken the guesswork out of how to approach a prospective borrower.

2) Service

Implementing the 90-day onboarding process has helped me keep track of my leads and referrals. It has helped me with my time management.

3) Mindset

I have become more confidence when speaking with agents and members. I do believe this is due to the opportunity statement. I'm not just asking for the business, but also building relationships.



MANAGER



ANDREW HARRIS

VP OF Mortgage

Mallory has thrived as an originator, expertly serving members outside our local markets. Unlike others, she can't rely on local events for networking. Instead, she excels in maintaining repeat business and ensuring our national members feel valued. The 90-day Sales system has optimized her database management, ensuring all members feel prioritized. Her phone communication skills are impeccable, benefiting both her and those members who can't visit a branch.