



Proof of Partnership: Suggested Activities for Agents and Loan Officers

1. Meet for business planning and review at least two times per year. Be clear on mutual production and income goals. Discuss budgets, spends, and ROI.
2. Share lists of web leads and inquiries - your LO partners may resurrect them and/or source loans for themselves! Make it easier by sharing platform access.
3. Get out and about! Canvas neighborhoods together; door knock and share value.
4. Prospect and preview FSBOs; they may not ever need an agent to list and sell their home, but they may become your next buyer and borrower!
5. Commit to co-hosting public open houses 1-2 times per month. Create the plan.
6. Commit to co-hosting a broker's open at least once a month. Create the plan.
7. Commit to co-hosting buyer's housewarming parties 4-6 times per year; this works great for first time buyers and for empty nesters. Create the plan.
8. Mutually participate in community seminars - first time buyers, seniors, investing, etc.
9. Prepare and send quarterly co-branded mail pieces to geo or demographic farms.
10. Mutually participate in and contribute to at least two client appreciation events per year; make it unique, interactive, and exclusive.
11. Share expenses related to platforms - Cole, Vulcan 7, Zillow, etc. - and be clear on necessary conversion and production requirements. Create the plan!
12. Mutually participate in and contribute to a monthly prospecting call night, and make it fun. Prizes, pizza, and people build culture and enthusiasm.
13. Feature each other in monthly market update videos; create consistency around this.
14. Join together to support and contribute to local charities, organizations, etc.
15. Loan officers should immediately meet with new/rookie team members to educate and inform - programs, rates, etc. Establish rapport to earn referrals.
16. Network together to connect with other local area business owners and influencers; host a quarterly B2B happy hour event. Form your own networking group!
17. Include each other at team building events, dinners, and masterminds.
18. Commit to getting EVERY buyer in front of your partner LO. It's easy!
19. Make this your mantra:

*"every opportunity I seek to create for myself
I intend to share with others"*