

USHERPA

MASTER ASCENT PLAN





FIELD GUIDE FOR SUCCESS

WEEK OF _____

MON

TUE

WED

THURS

FRI

Schedule Your Weekly Tasks

Make Loan in Process update calls ^U

Call Pre-quals and "0-60 Day" Prospects ^U

Call "Tier 1" Prospective Realtors

Call Builder, Other Referral Partners and Groups

Call Birthdays ^U

Call Annual Loan Checkups ^U

Create & Complete Tasks

Call Other Alerts

Review Usherpa Email Analytics & Dashboard

DAILY WINS

Notes: _____

Notes: _____

Notes: _____

Notes: _____

Notes: _____

WEEKLY GOALS

Face to Face Meetings

Social Media Posts ^U

New Realtors added to Usherpa

Quality Conversations - Document in Usherpa with follow up tasks

✓ Thank You Notes ^U

✓ Review Week and Set Goals for Next Week

^U Usherpa makes this easy with automated marketing campaigns!

USHERPA



FIELD GUIDE FOR SUCCESS

MONTH OF _____

EVERY OTHER WEEK

WEEK OF _____

- Call "60 - 90 Day" Prospects
- Call "Tier 2" Realtors
- Mine Database for Opportunities

WEEK OF _____

- Call "60 - 90 Day" Prospects
- Call "Tier 2" Realtors
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MONTHLY GOALS

Call "90+ Days" Prospects

Call "Tier 3" Realtors

Conduct Knowledge Building Activities Like:

- Read a business book
- Attend an event
- Read Usherpa Whitepapers and LO Interviews

Realtor Database Clean Up

- Make sure database is up to date with new Realtors
- Remove old Realtors
- Make sure database is up to date with correct addresses, email addresses and phone numbers

Review previous month

- Review Reports on Usherpa Dashboard
- See how you did on your Daily Wins and against your production goals



FIELD GUIDE FOR SUCCESS

YEAR _____

QUARTERLY GOALS

Q1

- Set production goals
- Send direct mail (optional) ^U
 - Quarterly to all previous Customers
 - 8-12 times a year to top 25% of Customers or "Advocates"
- Database Clean Up
 - Customers, Prospects, Business Partners
- Review previous quarter
 - Did you make your Daily Wins and production goals?

GOAL: _____

ACTUAL: _____

Q2

- Set production goals
- Send direct mail (optional)
 - Quarterly to all previous Customers
 - 8-12 times a year to top 25% of Customers or "Advocates"
- Database Clean Up
 - Customers, Prospects, Business Partners
- Review previous quarter
 - Did you make your Daily Wins and production goals?

GOAL: _____

ACTUAL: _____

Q3

- Set production goals
- Send direct mail (optional)
 - Quarterly to all previous Customers
 - 8-12 times a year to top 25% of Customers or "Advocates"
- Database Clean Up
 - Customers, Prospects, Business Partners
- Review previous quarter
 - Did you make your Daily Wins and production goals?

GOAL: _____

ACTUAL: _____

Q4

- Set production goals
- Send direct mail (optional)
 - Quarterly to all previous Customers
 - 8-12 times a year to top 25% of Customers or "Advocates"
- Database Clean Up
 - Customers, Prospects, Business Partners
- Review previous quarter
 - Did you make your Daily Wins and production goals?

GOAL: _____

ACTUAL: _____

ANNUAL GOALS

GOAL: _____



Review previous year

GOAL: _____



Write New Year business plan

GOAL: _____





FIELD GUIDE FOR SUCCESS

SELF ASSESSMENT FOR _____

On a scale from 1 - 10 (10 being the highest) how well are you doing in the areas below?

YOUR NETWORK

- Referral Partners (Realtors, Builders, Other)
- Past Customers
- Loan In Process Borrowers
- Prospects
- Other _____

ACTIVITIES

- Using Call Alerts
- Creating Groups
- Connecting with In Process Borrowers
- Using Notes & Task Features
- Mining Your Database for Opportunities
- Cleaning Your Database

OTHER ACTIVITIES

- Networking Events
- Knowledge Building
- Posting on Social Media
- Other _____

What are your barriers to improving in the areas that you feel will have the most impact on your business?

What are the most important things that your Usherpa Guide can help you with?
