

**Success &
Broker**®

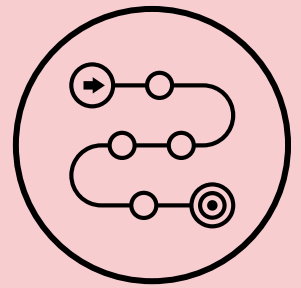


Chapter 2

Momentum in Motion

Week 14-26

Week 14: Potato, Potaato



Weekly mission: Choose a current or recent deal you're working on. Use the steps below to review and improve how you're communicating your loan proposal to the lender.

For each part of the timeline, fill in the prompts to check for alignment.



1. Say it (Phone Call)

What did you explain during the phone conversation?

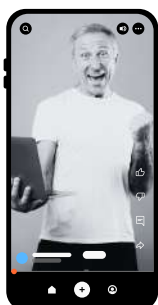
Did you confirm any lender preferences or requirements during the call?



2. Show It (Email + Supporting Notes)

Does your email or cover note match what you said on the call?

Do your attached documents support your explanation clearly?



3. Confirm It

Did you ask for confirmation or next steps from the lender/BDM?

Week 15: Nobody is Perfect



Weekly mission: Create a set of check-in templates you can reuse at key stages in the mortgage process.

For this activity, choose at least 3 touchpoints and write a version for either:

- Text message
- Email
- Phone call follow-up summary

Review this example below:

Stage	Channel	Your Message
Application submitted	Text	"Hi [Name], just confirming your application has been submitted today. I'll keep you updated as we hear back from the lender."
Pre-Approval Granted	Email	"Great news — your pre-approval has come through. Here's a quick summary of what it means, and next steps..."
Valuation	Text	"Valuation ordered today. Should have results in 1–2 business days. I'll be in touch as soon as I know more."

Week 15: Nobody is Perfect



Now, fill in the table below to create a series of templated messages at various stages of the customer journey.

Prompts to Guide Message Tone:

- “What would I want to know if I were the client right now?”
- “How can I keep this short, clear, and warm?”
- “Does this message reduce anxiety or leave room for doubt?”

Stage	Channel	Your Message
Initial Call		
Pre-Approval		
Submission		
Valuation		
Approval		
Settlement		

Week 16: Influenced vs Influencer



Weekly Mission: Put your influencing skills into action. Try guiding a client's decision with confidence, not just presenting options.

Influencer Convo Builder



Use the template below to build and write out a 3-part influencing response to a client:

1. Ask an open-ended question

Example: "What's your main priority — stability or flexibility?"

2. Provide a clear, relevant recommendation

Example: "Based on that, I'd suggest we look at a split loan option — it gives you a bit of both."

Week 16: Influenced vs Influencer



How might changing how you frame a recommendation change how it lands?

3. Check for clarity and confidence

“Does that feel aligned with what you were hoping for?”

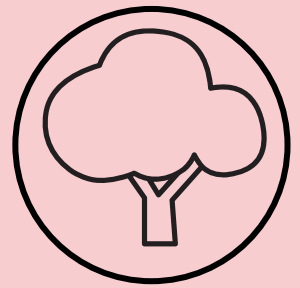


**SUPPORT +
INFLUENCE**

When you influence well,
clients don't feel pushed —
they feel supported.

”

Week 17: Willow or Oak



Weekly mission: Reflect on your strengths, get feedback, and learn how others see you — it builds confidence and authenticity.

Self-Reflection

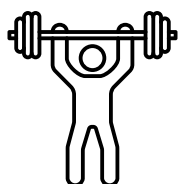
Select and write down in the box below the qualities that describe you best (choose up to 6):

Structured
Adaptable
Empathetic
Decisive
Reliable

Flexible
Calm under pressure
Assertive
Thoughtful
Confident communicator

Strategic
Honest
Supportive
Action-oriented
Independent

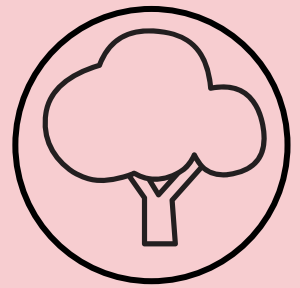
My Qualities



Willows bend. Oaks stand strong. Both are powerful.

Great brokers know when to be each. Use this activity to explore your style, how others see you, and lead with authenticity.

Week 17: Willow or Oak



Outside Perspective - Ask Someone in Your Circle

Pick 1–2 people (e.g. mentor, colleague, friend) and ask:

“What’s something I do well when supporting others?”

“What’s one area I could grow in professionally?”

What did they say?

Define Your Leadership Identity

Based on your reflection and feedback, complete this sentence:

As a broker, I lead and build trust by being...

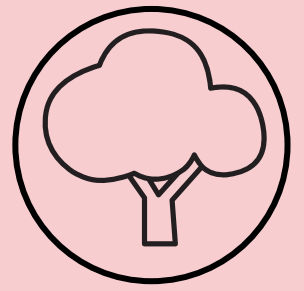


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Week 17: Willow or Oak



Oak, Willow or Both?

Which metaphor feels more like you? Circle the face that statement that you relate to most.



Mostly Oak — strong presence, steady, structured



Mostly Willow — adaptable, responsive, intuitive



A blend of both — and that's your strength

What does that mean for how you want to grow?

**THE UNDERTAKING OF A NEW
ACTION BRINGS NEW
STRENGTH**



Week 18: Run the Long Run



Weekly Mission: Choose one recent or in-progress client file. Complete the sections below honestly and thoughtfully.

Deal Summary

Client initials:	
Loan type: (e.g. refinance, purchase, investment)	
Requested loan amount:	\$
Key goal of the client:	



Think: Your Gut Check

Describe your first reaction to this deal:








- Was it clear and straightforward?
- Did anything raise a flag for you?
- Have you had any concerns or second thoughts about the deal?
- If yes, briefly explain:

Week 18: Run the Long Run



The “Would I Lend It?” Assessment

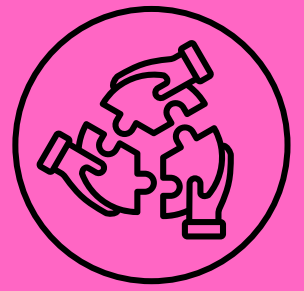
For each question below, tick record your Yes or No response and add 1–2 lines of reasoning.

Would I lend this money if it were my own?	 
Is this loan structure aligned with the client’s long-term financial wellbeing?	 
Does the client fully understand their product and obligations?	 
Would I feel confident explaining this recommendation to a mentor or compliance reviewer?	 
If things go wrong, would I feel I acted with integrity and care?	 



Would you submit this deal again — knowing everything you know now? Why or why not?

Week 19: Talent is Hardwork

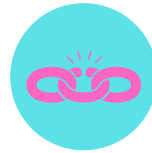


Weekly Mission: You'll do a simple SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) to better understand your strengths and how you can use them to stand out from the competition.



Strengths

What do you do well as a broker?



Weaknesses

Where do you lose momentum or confidence?

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Opportunities

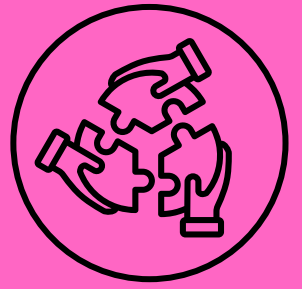
Where could you stand out more or grow your impact?



Threats

What might hold you back – competitors, mindset, habits?

Week 19: Talent is Hardwork



Make Your Strength Stand Out:

Pick one of your strengths (identified in the SWOT) and turn it into a clear differentiator.

1

My strength:

2

Why it matters to clients:

3

How I'll use it more:

Week 20: Perfect. Not Perfect.



Weekly Mission: Turn one mistake into a tool for growth. Use your reflection to guide your next move — and be the kind of broker who learns fast, adapts, and leads by example.

Why It Matters

Great brokers don't avoid mistakes — they learn from them. This activity helps you practise a growth mindset by reflecting on a real situation where things didn't go to plan and turning it into a lesson you can use.

Pick a real moment



Imagine a newer broker is going through something similar.

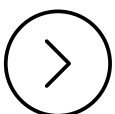


What would you tell them?

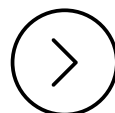
Reframe it



Now look at the same moment with fresh eyes.



What would you do differently next time?



What's one thing you learned about yourself as a broker?

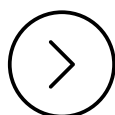
Week 20: Perfect. Not Perfect.



Pay It Forward



Think of a recent mistake, awkward client interaction, or deal that didn't land right.



What happened? How did you handle it?

Your advice



**WALK IN SOMEONE
ELSE'S SHOES**



PRO TIP

Keep this reflection handy for your next 1:1 or team meeting — it shows you're growing and guiding.

Week 21: 16 Pieces. 64 Squares.



Weekly Mission: Use example clients and use their insights to reflect, adjust, and shape a stronger value proposition for future clients.

Complete the client profiles below to practice how you can reflect on feedback, make adjustments, and build a stronger value proposition for future clients.

Review the feedback shared by your client Sally below:

Client Feedback

"I loved how quick you were to respond. But I felt like I was chasing info at times — especially around what documents were needed."



What Sally valued most:
Speed in response

Week 21: 16 Pieces. 64 Squares.



Pivot and Improve

Use Sally's feedback to shape what you highlight in your future client conversations.

Ask yourself:



- What part of the process should I repeat because it worked well for her?
- How can I include this in my upfront messaging or proposal?
- What language or examples can I use to show this value clearly?
- How might I personalise this for other clients who have similar needs or values?

Define Your Leadership Identity



Now write 3 specific ways you'll apply this insight in your future value propositions:



.....



.....



.....

Week 21: 16 Pieces. 64 Squares.



Weekly Mission: Use example clients and use their insights to reflect, adjust, and shape a stronger value proposition for future clients.

Complete the client profiles below to practice how you can reflect on feedback, make adjustments, and build a stronger value proposition for future clients.

Review the feedback shared by your client John below:

Client Feedback

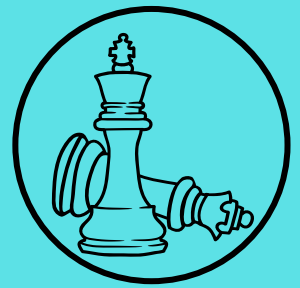
"I appreciated how you broke everything down in plain English. I never felt dumb asking questions.

But I didn't fully get why you picked that lender."



What John valued most:
Simplicity and Transparency

Week 21: 16 Pieces. 64 Squares.



Pivot and Improve

Use John's feedback to shape what you highlight in your future client conversations.

Ask yourself:



- What part of the process should I repeat because it worked well for him?
- How can I include this in my upfront messaging or proposal?
- What language or examples can I use to show this value clearly?
- How might I personalise this for other clients who have similar needs or values?

Define Your Leadership Identity



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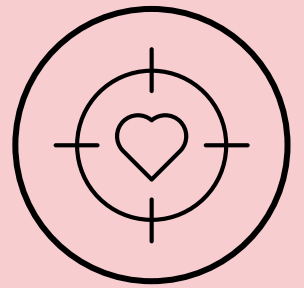


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Week 22: Every Move Must Have a Purpose



Weekly Mission: Build your habit of presence. Create a simple 3-step plan to stay focused in client meetings. Small actions build big trust.



Use the prompts below to guide you to create 3 habits to achieve presence in your workday . Small actions lead to big trust.



Habit 1: Before I meeting I will....

Example: Switch my phone to flight mode



Habit 2: During the meeting I will....

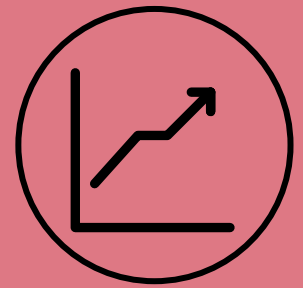
Example: Take physical notes to avoid digital distraction



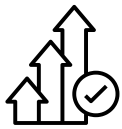
Habit 3: If I get distracted, I will....

Example: Summarise what I have heard with the client to re-engage with the conversation.

Week 23: Be a Top Player



Weely Mission: Reconnect with one BDM—make it personal, valuable, and move the relationship forward.



This activity will help you map, understand, and strengthen your relationships with Business Development Managers (BDMs). You'll reflect on who's already in your network, what makes them tick, and how to build meaningful, lasting rapport.

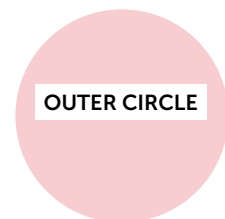
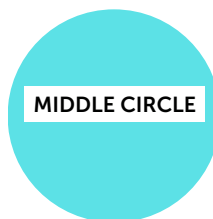
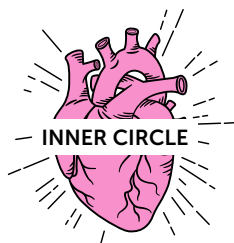
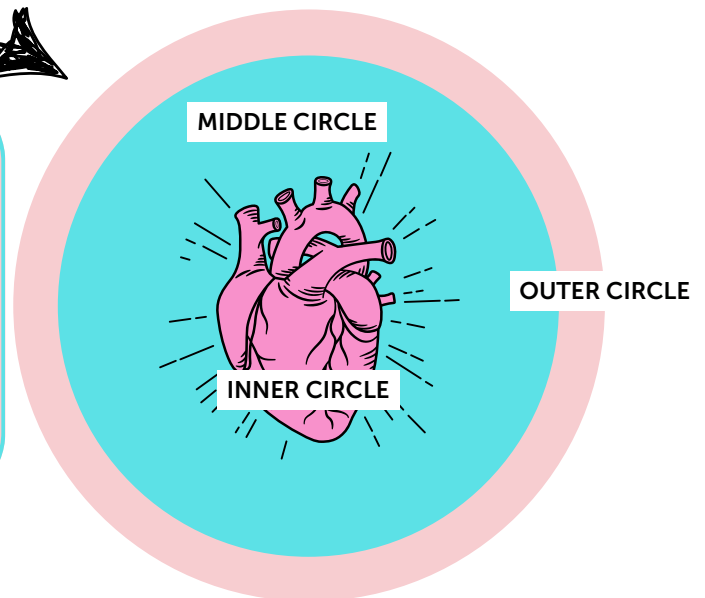
YOUR BDM CIRCLES

List names in each section.

Then ask:

Who's missing?

Who do you want to move closer to the centre?

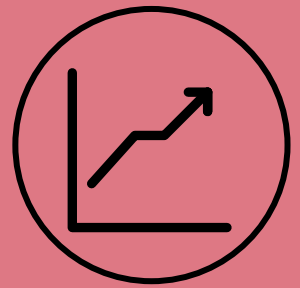


BDMs your trust:

BDMs you've worked with but want to know better:

BDMs you've never worked with but want to connect:

Week 23: Be a Top Player



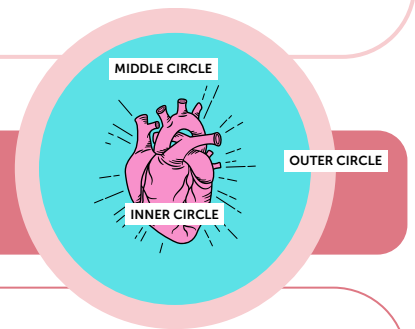
Choose one BDM from your list and complete:

What's their preferred communication style? (e.g. direct, casual, detail-focused)

What's a pressure they've faced recently?

What's one small win they'd genuinely value?

Swift Rapport Tactics



Jot down 2–3 things you can do to build quick, genuine connection:

.....
How can you mirror their tone?

.....
What past convo or event could you refer back to?

.....
What value can you offer before asking for something?

Week 24: Know Your Stuff



Weekly Mission: Use the 15/15/15 to make measurable impact with your clients.



15/15/15

Use this activity to plan and simplify your next client meeting using the proven 15/15/15 approach. Keep it clear, goal-driven, and easy to say yes to.

Frame It Up (First 15 Minutes)



What's their situation in one sentence?



What goals did they mention (in their words)?



How will you open the meeting?

Example: "Here's how we'll use our time today..."

Week 24: Know Your Stuff



Present Your Recommendation (Middle 15 Minutes)



What is your ONE clear recommendation?

List the top 3 benefits tied to their goals:



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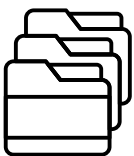


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What are the simple next steps?



Week 24: Know Your Stuff



Sense Check & Confirm (Final 15 Minutes)



How will you check their understanding?

Example: "Does this feel right based on what we discussed?"



How will you confirm the outcome (no jargon!)?

"Next step is..."

Quick Self-Check

Which part of your meetings do you tend to overcomplicate?



One phrase you'll try this week to keep it simple:



Week 25: From Little Things Big Things Grow



Weekly Mission: This week plan 3 small, meaningful actions that build stronger relationships and long-term impact.

Choose to stay committed



Build trust, referrals, and long-term value then answer the reflection prompts below



Identify 3 small, purposeful actions that can create lasting impact and strengthen key relationships.

One act for a client

e.g. Leave a handwritten thank-you note in their mailbox after a meeting.

Week 25: From Little Things Big Things Grow



Identify 3 small, purposeful actions that can create lasting impact and strengthen key relationships.

One act for someone in your sphere

e.g. Share an article or podcast link that aligns with a recent conversation you had.

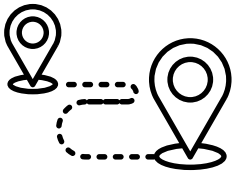
One moment of follow-up or unexpected appreciation

e.g. Send a quick message to a referrer thanking them for a lead, even if it didn't convert—just to show they're valued.

Week 26: You Cannot be all Things to all People



Weekly mission: Identify who your best-fit clients are—so you can focus your time on the ones who value what you do best.



The Perfect Fit Map

Fill in the template below to identify the attributes of your ideal client.

Key Attribute

Add adjectives to describe this persona

Short Description

Add phrases to bring this persona to life

Needs

Add the reasons for taking this journey

Challenges

Add pain points or potential frustrations

Opportunities

Add ways that your service can address the pain points