

Company Name

Susan Stanley – Mortgage Consultant

Date 2012

STEP 1

Company Vision

Vision

What will this company look like after 5 -10 years? What will this company be known for? Use the present tense.

Susan Stanley is a Mortgage Consultant who is recognized by Realtors, Financial Planners, CPAs, and past customers as someone they want to refer to their clients, family, and friends.

I work independently as a mortgage broker offering the broadest spectrum of options to my customers.

I close 3 to 5 loans per month generating a monthly income of \$7500 to \$12,000.

I am known for my expertise, integrity, ethics, and professionalism in the mortgage industry.

I am recognized for my commitment to excellence through continuing education.

I work Monday and Tuesday at my branch office and Wednesday and Thursday in my home office. I take Fridays off most weeks.

I take 6 weeks of vacation annually, one trip to the Mexican Riviera and at least one trip to Vail, Colorado.

STEP 2

Mission Statement

Mission

What is the purpose of this business? Use no more than 1-2 sentences.

To help the mortgage consumer take control of their financial future by providing valuable information, options, and strategies necessary to make a decision that is in line with their goals, and above all, protects their best interests.

STEP 3

Branding

Branding

How will this business differentiate itself in the Market Place? List your strategy to tie your brand and colors into your business cards, tagline, website, blog, and marketing materials.

Tag Line: "Mortgage Solutions you can Live with"

I plan to hire a professional designer to create a custom designed logo that I will use on my business card on all of my marketing materials.

I will use blue and white as those colors represent trust and security.

I will also have a custom designed banner for my blog: The Mortgage Minute

I will have a custom email signature jpg file with my photo and tagline

All my marketing materials will have a similar look

STEP 4 Creating Meaningful Goals

Meaningful Goals

Create goals that are meaningful to you. Add target dates. How are you going to measure your success?

Personal: go to the gym 3 times per week, stay away from foods that drain my energy, and go to bed earlier and get up earlier.

Business goals for 2012:

- Be positioned for a market turn around in 10-12 months.
- Complete graphic design work and submit to SendOutCards in December 2012.
- 1st QTR 2012: Begin mail campaign to past customers & Realtors. Have Blog set up in January and write first monthly article. Identify and purchase mortgage tools for marketing presentations. Set up 1 Realtor coffee meeting per week. Investigate networking opportunities and make selection.
- 2nd QTR 2012: Implement networking selections and begin using marketing tools. Search for speaking opportunities.
- 3rd QTR 2012: Continuing education work

STEP 5 Strategies

Strategies

How will you build this company over time?

- 1) Stay in CONSTANT CONTACT with current Realtors via (news letter, blog) and face to face over coffee.
- 2) Be known as an EXPERT in the mortgage industry (write articles for my Blog, use software/online tools like "Loan Tool Box", "The Mortgage Coach", or "The Mortgage Market Guide").
- 3) TARGET high credit score clients.
- 4) Expand NETWORKING opportunities with Financial Planners and CPAs

STEP 6 Marketing Activities

Marketing Activities

Your marketing activities are the actions used to build your business and achieve your Meaningful Goals. Include: Internet Marketing, Referral Marketing, Advertising, Promotions, Publicity, & Customer Contact. Make sure to include Target Dates.

- Join Toastmasters and attend weekly to improve speaking ability and to network
- Research networking events and find two to attend weekly
- Send out my newsletter once monthly
- Write 2 blog posts per week on my blog
- Go out for coffee with one realtor per week
- Place an ad in the local lifestyle magazine and drive traffic to my blog
- Write a monthly article in the local lifestyle magazine and drive traffic to my blog
- Create a Meet Up Group for Real Estate Investors and meet monthly at first, and then weekly
- Join the metropolitan area Real Estate Investors Club and network monthly
- Join the Financial Planning Association and network with CFP's at each monthly luncheon