



MORTGAGE MASTERMIND  
ELITE

# Mortgage Satisfaction Assessment



The Defining Difference  
BY CINDY ERTMAN









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## Mortgage Satisfaction Assessment

NAME \_\_\_\_\_ DATE \_\_\_\_\_

- Each snapshot below represents an area of your mortgage business.
- Rate your satisfaction level in each of these areas by circling the number that matches your satisfaction level.

**SATISFACTION SCORING: Zero (0) means not satisfied & Ten (10) means highly satisfied.**

 <p><b># OF REFERRAL PARTNERS</b> 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>	 <p><b>PERSONAL PRODUCTION LEVELS</b> 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>	 <p><b>COMPELLING CLIENT EXPERIENCE</b> 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>	 <p><b>MARKETING EXECUTION</b> 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>
 <p><b>TIME, ENERGY &amp; PRODUCTIVITY</b> 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>	 <p><b>HIGH IMPACT TEAM</b> 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>	 <p><b>GOOD SELF CARE</b> 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>	 <p><b>WORK/LIFE BALANCE</b> 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>



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## Mortgage Satisfaction Assessment Action Items

- List one action item for each area to help you increase your score.



### # OF REFERRAL PARTNERS

Your Score: \_\_\_\_\_

Action(s) that you will take to increase your score:

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### PERSONAL PRODUCTION LEVELS

Your Score: \_\_\_\_\_

Action(s) that you will take to increase your score:

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### COMPELLING CLIENT EXPERIENCE

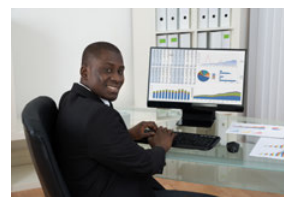
Your Score: \_\_\_\_\_

Action(s) that you will take to increase your score:

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### MARKETING EXECUTION

Your Score: \_\_\_\_\_

Action(s) that you will take to increase your score:

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## Mortgage Satisfaction Assessment Action Items

- List one action item for each area to help you increase your score.



### TIME, ENERGY & PRODUCTIVITY

Your Score: \_\_\_\_\_

Action(s) that you will take to increase your score:

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### HIGH IMPACT TEAM

Your Score: \_\_\_\_\_

Action(s) that you will take to increase your score:

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### GOOD SELF CARE

Your Score: \_\_\_\_\_

Action(s) that you will take to increase your score:

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### WORK/LIFE BALANCE

Your Score: \_\_\_\_\_

Action(s) that you will take to increase your score:

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