

## How to Use Masterminds & Lunch and Learns to Grow Your Business



**The Defining Difference**  
BY CINDY ERTMAN

CINDY ERTMAN  
The Defining Difference  
TheDefiningDifference.co  
m info@CindyErtman.com  
Phone: 310-295-1130

## How to Lead a Powerful Mastermind Group for Referral Partners

Building and leading a “Mastermind Group” is a great way for Mortgage Loan Originators to add massive value and grow their referral partner network.

### What is a Mastermind Group?

A Mastermind Group has a shared commitment of working toward similar goals. Mastermind groups learn and grow together. They act as sounding boards for one another, providing feedback and brainstorming ideas. A Mastermind Group enables individuals to leverage the collective mindset and experience of their peers and provides support along the way.

### How to Build Your Own Referral Partner Mastermind Group

1. **Determine who you want in your group.** Make a list of referral partner names, email addresses, and contact phone numbers. We recommend inviting up to 20 people maximum to your group. This can be existing Realtor partners, prospective Realtor partners, CPAs, Financial Planners, Divorce Attorneys, etc.
2. **Select which venue or video conferencing technology you will use (if virtual).** Visit the venue and test your technology in advance. If you are hosting a virtual mastermind, it is best if you use a wired computer connection vs. a wireless connection.
3. **Determine when your meetings or video calls will take place and how often.** Stay consistent. Selecting the same day and time works best for most business professionals.
4. **Plan a bulleted agenda for the mastermind.** Have your thoughts, ideas, and suggestions prepared prior to the meeting. Asking questions is a great way to gain engagement.
5. **Use the helpful list on the next page for referral partner mastermind ideas.** Map out the topics for your first two mastermind meetings.
6. **Call each potential referral partner personally to invite them to join the group.** Have the date and time, brief description, and benefit of the mastermind group before inviting them to join.
7. **Make a list of all who have signed up.** Send email reminders the day before and the morning of the mastermind.
8. **The power of a mastermind group is engagement.** Be sure to encourage participation in each meeting or on every call, open Q&A and review the topic for the next call to keep them engaged.
9. **Brainstorm suggested topics of interest** for future masterminds with your group.
10. **Follow up with those who attended and those who didn't attend.** Send a quick email or video text to thank those who attended and offer a 'teaser' of what the next mastermind will cover to encourage those who didn't attend to join the next one.

## How to Lead a Powerful Mastermind Group for Referral Partners

### Referral Partner Mastermind Group Call Topics

1. How to develop a plan to establish a new vision and goals for your future.
2. How to create impactful videos.
3. How to maximize your social media presence.
4. Mastermind marketing strategies that work in a challenging market.
5. Claiming and setting up your “Google My Business.”
6. Invite a financial planner to share the state of the financial market.
7. Feature home stagers and have them speak to the importance of the home presentation.
8. Invite a local Appraiser to review local market trends.
9. How to master your mindset and overcome limiting beliefs.
10. Develop online training programs to educate First Time Home Buyers.
11. How to shift your daily plan to incorporate health and wellness practices.
12. Eliminating your energy drainers – negative people, news, influences, and self-talk.
13. Morning rituals to eliminate stress and increase productivity.
14. How to build a team that caters to your clients and allows you to focus on making it rain.
15. How to effectively communicate with past clients.
16. Lead conversion best practices - strategies to attract and convert listing and buyer leads.
17. What are the most efficient ways to market yourself in today's real estate world?
18. How to win the business of Millennials.

## Lunch & Learns that Deliver Massive Value for your Clients and Referral Partners

### What is the Value of a Lunch and Learn?

Lunch and Learns allow you to interact and share knowledge and expertise with your clients and referral partners in a social, relaxed and collaborative setting. By providing value, you become valuable. Creating a fun, educational experience can help brand you as a local expert and shine a light on your passion for serving the community at the highest level.

### How to Prepare for a Lunch and Learn

1. **Create your guest list.** Identify how many people the venue will accommodate and create a list of your most valued Realtors, potential referral partners or prospective clients.
2. **Send out a Save the Date at least 4 weeks before.** Plan with enough notice so that your clients will be able to add it to their calendar well in advance.
3. **Email and invitation 3 weeks before.** Continue to send invitations weekly up until the event to those who have not yet RSVP'd.
4. **Call everyone on the invite list 2 weeks before who hasn't RSVP'd** to extend a personal invitation.
5. **Prepare event materials 1 week before** (sign in sheets, pens, iPad, name tags, gifts, training materials, flyers, business cards, roster of attendees (if applicable), WiFi cards, etc.)
6. **Email event reminders the day before** with the event details.
7. **Confirm the speaker and food orders the day before.**
8. **Send a reminder text the day of the event.** Include any instructions about parking, directions, etc.
9. **Be a gracious host.** A good host will ensure they speak with every guest.
10. **Encourage participation.** Ask questions and find opportunities to open the conversation for guests to get involved.
11. **Share the event on social.** Take pictures and post to social so everyone can tag and share.
12. **Send a thank you card after the event.** Thank guests for coming and share your appreciation for their participation.

## Lunch & Learns that Deliver Massive Value for your Clients and Referral Partners

### Lunch and Learn Topics

1. **Appraisals.** Learn how they're done and how to properly fight a low appraised value.
2. **Business / Goal Planning.** Create your 90-Day goal plan to prepare for the next quarter.
3. **Credit.** Invite a credit expert to speak about how to restore, improve and build your credit.
4. **First Time Home Buyer Seminar.** Discuss everything that they need to know about buying a home.
5. **Home Organization.** Invite a professional organizer to share tips and tricks to help you get more organized.
6. **Wealth Management & Investing.** Ask a financial planner to share tips on building wealth.
7. **Investing in Real Estate.** Flipping vs. long-term rentals, hard-money vs. traditional financing.
8. **Mortgage Education.** An overview on mortgage lending. How loans are priced, define industry specific terms, and explain a few of the different types of loan scenarios.
9. **Social Media Done Right.** Invite a YouTube, TikTok or Facebook expert to share the 'dos and don'ts' of social media.
10. **Taxes.** Ask an accountant to share the common mistakes and tips to ensure you're not overpaying Uncle Sam.
11. **Budgeting 101.** How to manage your expenses and prepare for your family's future.
12. **Time Management.** Discuss tools and technology to streamline your day-to-day in order to be more efficient and productive.
13. **Industry trends & market update.** Compile the latest data on the housing market and present it in a positive, easy-to-understand way.
14. **Hiring the right team to grow your business.** Share the tools and strategies you used to hire your high-impact team.
15. **Creating a Vision Board.** Go the extra mile and provide the materials for guests to create their own vision board.
16. **How to create the ultimate client experience.** Generating referrals through exemplary service.
17. **Tactical Marketing Strategies.** How to build a marketing plan to grow your business.