



90-DAY MORTGAGE SUCCESS GOAL PLAN

Jumpstart Your Mortgage Success



CINDY ERTMAN

The Defining Difference
info@CindyErtman.com

Phone: 310-295-1130

90-DAY MORTGAGE SUCCESS GOAL PLAN

Jumpstart Your Mortgage Success

The Importance of Goal Planning – Why have goals?



- Without goal setting, we move from situation to situation in a reactive mode rather than taking a focused path towards our most desired outcomes.
- Our lives and our businesses end up being influenced by external forces instead of own wants and desires. To create the mortgage business and the production levels you desire it is critical to set clear goals.

The Power of Goal Setting

- Harvard MBA study in 1979 showed that 13% of the class that set written goals with no plan, made 2X the money as the 84% with no goals.
- 3% of the class that had both written goals and a plan, were making 10X the money as the rest of the class.
- When you start giving your life objectives and purpose through the power of goal setting, the results can be absolutely staggering.

How to Set Intentional Goals for Your Mortgage Business

STEP 1: Take my *Mortgage Satisfaction Assessment* on page 4 and score yourself on 8 key areas of your mortgage business to see where you are doing well and where you are falling short.

STEP 2: Fill in your *Mortgage Business Roadmap* on page 5 to build the vision for your production numbers and your high impact team.


STEP 3: Create your *90-Day Total Success Blueprint* on page 6 to develop goals for 5 key areas of your business and supporting action items for each goal.

90-DAY MORTGAGE SUCCESS GOAL PLAN

Jumpstart Your Mortgage Success

STEP 1: MORTGAGE SATISFACTION ASSESSMENT

Choose the number that matches your current satisfaction level.



OF REFERRAL PARTNERS

10	Highly Satisfied
9	
8	
7	
6	
5	Satisfied
4	
3	
2	
1	
0	Not Satisfied



PERSONAL PRODUCTION LEVELS

10	Highly Satisfied
9	
8	
7	
6	
5	Satisfied
4	
3	
2	
1	
0	Not Satisfied



COMPELLING CLIENT EXPERIENCE

10	Highly Satisfied
9	
8	
7	
6	
5	Satisfied
4	
3	
2	
1	
0	Not Satisfied




MARKETING EXECUTION

10	Highly Satisfied
9	
8	
7	
6	
5	Satisfied
4	
3	
2	
1	
0	Not Satisfied



TIME, ENERGY & PRODUCTIVITY

10	Highly Satisfied
9	
8	
7	
6	
5	Satisfied
4	
3	
2	
1	
0	Not Satisfied




HIGH IMPACT TEAM

10	Highly Satisfied
9	
8	
7	
6	
5	Satisfied
4	
3	
2	
1	
0	Not Satisfied



GOOD SELF CARE

10	Highly Satisfied
9	
8	
7	
6	
5	Satisfied
4	
3	
2	
1	
0	Not Satisfied



WORK / LIFE BALANCE

10	Highly Satisfied
9	
8	
7	
6	
5	Satisfied
4	
3	
2	
1	
0	Not Satisfied

90-DAY MORTGAGE SUCCESS GOAL PLAN

Jumpstart Your Mortgage Success

STEP 2: YOUR MORTGAGE BUSINESS ROADMAP

Fill out this business planning worksheet to develop concise production and team goals.



PRODUCTION & INCOME GOALS

Total production volume last year?

Total families served last year?

Production volume for next year?

Families served next year?

Income goal for next year?



HIGH IMPACT TEAM GOALS

Who are your team members and what are their current roles?

TEAM MEMBER

TITLE AND ROLE

WHAT ARE MY BUSINESS GAPS?

What are my biggest and most painful business gaps?

BUSINESS GAP #1:

BUSINESS GAP #2:

BUSINESS GAP #3:

90-DAY MORTGAGE SUCCESS GOAL PLAN

Jumpstart Your Mortgage Success

STEP 3: YOUR 90-DAY MORTGAGE SUCCESS GOAL PLAN

Set BIG ROCK goals for the next 90-Days for 5 key areas of your business.



- The 90-Day Mortgage Success Goal Plan is a powerful tool that teaches you how to master the power of intentional choice to bring your vision to reality.
- This tool will help you to define 3 high impact goals for five (5) key areas of your life and three (3) specific, supporting action steps to accomplish each goal.

FIVE (5) KEY AREAS OF YOUR LIFE

1. Career/Work
2. Health/Wellness
3. Family/Relationship
4. Personal/Business Growth
5. Personal Finances

3 CAREER/WORK GOALS and 3 ACTION STEPS

CAREER/WORK GOAL #1:

ACTION STEPS:

1.

2.

3.

CAREER/WORK GOAL #2:

ACTION STEPS:

1.

2.

3.

CAREER/WORK GOAL #3:

ACTION STEPS:

1.

2.

3.

3 HEALTH/FITNESS GOALS and 3 ACTION STEPS

HEALTH/FITNESS GOAL #1:

ACTION STEPS:

1.

2.

3.

HEALTH/FITNESS GOAL #2:

ACTION STEPS:

1.

2.

3.

HEALTH/FITNESS GOAL #3:

ACTION STEPS:

1.

2.

3.



3 FAMILY/RELATIONSHIP GOALS and 3 ACTION STEPS

FAMILY/RELATIONSHIP GOAL #1:

ACTION STEPS:

1.

2.

3.

FAMILY/RELATIONSHIP GOAL #2:

ACTION STEPS:

1.

2.

3.

FAMILY/RELATIONSHIP GOAL #3:

ACTION STEPS:

1.

2.

3.



3 PERSONAL/BUSINESS GROWTH GOALS and 3 ACTION STEPS

PERSONAL/BUSINESS GROWTH GOAL #1:

ACTION STEPS:

1.

2.

3.

PERSONAL/BUSINESS GROWTH GOAL #2:

ACTION STEPS:

1.

2.

3.

PERSONAL/BUSINESS GROWTH GOAL #3:

ACTION STEPS:

1.

2.

3.



3 PERSONAL FINANCES GOALS and 3 ACTION STEPS

PERSONAL FINANCES GOAL #1:

ACTION STEPS:

1.

2.

3.

PERSONAL FINANCES GOAL #2:

ACTION STEPS:

1.

2.

3.

PERSONAL FINANCES GOAL #3:

ACTION STEPS:

1.

2.

3.

STEP 3: YOUR 90-DAY MORTGAGE SUCCESS GOAL PLAN

Set BIG ROCK goals for the next 90-Days for 5 key areas of your business.

GOALS AND ACTION ITEM EXAMPLES

Career/Work Goals	Career/Work Action Items
<ul style="list-style-type: none"> Income goals for the year How many Sales _____ Management Partners Hire Assistant Marketing Plan Do more video Improve social media presence 	<ul style="list-style-type: none"> 5 income producing activities Who to call by when? Call past clients & do check in Write job description & place ad Postcard Mailing Map marketing efforts (next 6 mo.) Commit to filming 1 video per week Hire a part-time social media consultant
Health/Fitness Goals	Health/Fitness Action Items
<ul style="list-style-type: none"> Lose 15 lbs. Start yoga class Change diet- eat healthier No alcohol Mon.-Thurs. Give up Soda Quit Smoking 8 hours of sleep Meditation Get physical & recommended preventative tests Eat at least 1 vegetable every day Reduce red meat intake to 2x/month Try 1 new workout per month 	<ul style="list-style-type: none"> Google yoga studios Book 3 classes Hire trainer Make daily healthy smoothies No sugar- rid house of sugar Download Deepak 15-minute meditation Fitness bands (Nike Fuel band or Fit Bit bands, etc.) Plan to run a marathon Plant a garden in my backyard Research tasty ways to cook vegetables Replace 1 meat-based meal with 1 plant-based meal weekly

STEP 3: YOUR 90-DAY MORTGAGE SUCCESS GOAL PLAN

Set BIG ROCK goals for the next 90-Days for 5 key areas of your business.

GOALS AND ACTION ITEM EXAMPLES

Family/Relationship Goals

- Establish tradition
- Spend time alone as a couple
- Memorable family vacations
- Eat more meals together
- Improve home environment
- Have meals together
- Start a special savings fund
- Start a new family hobby
- Do a community service project together
- Visit with extended family
- Take a family portrait
- Set a budget for holiday spending
- Work on home projects
- Rescue a dog and take family hikes

Family/Relationship Action Items

- Determine the “must attend” functions for children’s school activities & schedule to be there
- Take turns planning special “date nights”
- Schedule dinner when the entire family can attend
- Set home traditions for special holidays
- Make sure to clean and spruce up home environment so your home is a sanctuary & escape from life
- Research community family volunteer events you can participate in
- Have weekend family game nights

Personal/Business Growth Goals

- Do something each week that reinvigorates your mind
- Learn another language
- Learn how to play an instrument
- Extracurricular activities that stretch me and help me grow
- Study a topic that I find interesting
- Develop a higher level of self-esteem and positivity

Personal/Business Growth Action Items

- Listen to motivational audio CD’s on the way to and from work
- Buy Rosetta Stone program to learn Spanish
- Take a cooking class
- Go to a live event for a motivational / inspirational speaker
- Buy books on coin collecting

STEP 3: YOUR 90-DAY MORTGAGE SUCCESS GOAL PLAN

Set BIG ROCK goals for the next 90-Days for 5 key areas of your business.

GOALS AND ACTION ITEM EXAMPLES

Personal Finance Goals

(How are you managing your money?)

- Pay off a loan early
- Save extra money for retirement and other long-term plans
- Create an emergency fund
- Learn more about investing
- Save on interest charges
- Improve your financial literacy
- Create an estate plan

Personal Finance Action Items

(How are you managing your money?)

- Put away 10% of each paycheck
- Consolidate loans
- Pay off credit cards
- Refinance home mortgage
- Refinance loans
- Hire an attorney to help create a will
- Analyze home expenses & figure out ways to save
- Research family plans or other packages for cell phones, cable etc.
- Read books or take a course on financial literacy
- Hire a financial planner