

Mortgage Satisfaction Assessment





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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.

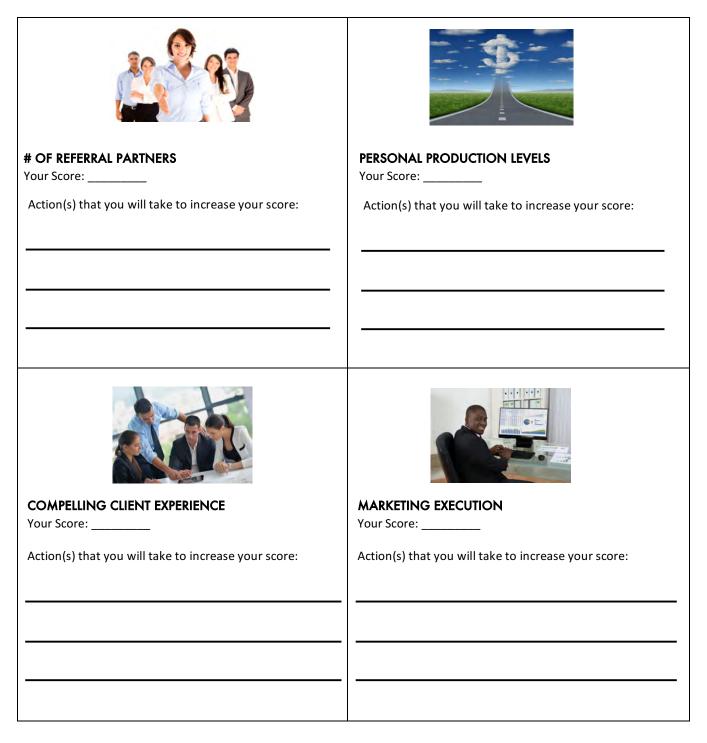
SATISFACTION SCORING: Zero (0) means not satisfied & Ten (10) means highly satisfied.

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



Mortgage Satisfaction Assessment Action Items

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





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• 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:



HIGH IMPACT TEAM
Your Score: _____

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



GOOD SELF CARE

Your Score: _____

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



WORK/LIFE BALANCE
Your Score: _____

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

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