



# Mortgage Satisfaction Assessment



The Defining Difference  
BY CINDY ERTMAN







CINDY ERTMAN  
The Defining Difference  
[www.TheDefiningDifference.com](http://www.TheDefiningDifference.com)  
[Info@CindyErtman.com](mailto:Info@CindyErtman.com)  
Phone: 310-295-1130

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

## 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:

---



---



---



### PERSONAL PRODUCTION LEVELS

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

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

---



---



---



### COMPELLING CLIENT EXPERIENCE

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

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

---



---



---



### MARKETING EXECUTION

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

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

---



---



---

## 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:

---



---



---



### 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:

---



---



---