



How to Create a High Impact Team



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How to Create a High IMPACT Team



- Hiring, training, and managing a high impact team is imperative to scaling your business.
- Most loan originators today have LOA support to maintain consistent volume and enhance their capacity to expand their business.

Positive Impact + Compassion + Extraordinary Customer Service = RESULTS

1. Create Your High IMPACT Team.

- The team's job is to make an impact through every customer interaction.
- With each interaction, have your team members ask themselves this question...

**Am I making a positive impact with compassion
resulting in extraordinary customer service?**

2. Hire the right people.

- Place an ad with a compelling work proposition and highlight company culture.
- Have candidates interviewed by at least 2 people to get the input of others.
- Check at least three viable business references.
- Run a DiSC® profile on all final candidates. I use DiSC® 2.0.
- Google your candidates, including their phone numbers, and review their social media profiles.

3. Clearly map out roles and responsibilities for each team member in writing.

4. Hold weekly team meetings.

- Create team “buy in” for your goals and vision with weekly accountability.
- Debrief challenged loans to create solutions for future business.

5. Hold daily pipeline reviews.

- Hold the team accountable.
- Keep the pipeline on track.

Interview Questions

Interviewing candidates effectively requires insight, creativity and strategy. Remember, during the interview process, candidates are also evaluating you and your company just as you're evaluating them. Being adequately prepared with questions that not only help you separate desirable candidates from average candidates but also those that engage the candidate on a personal level and reveal how he or she will work with a team is key. Hiring the right candidate offers a massive return to your business in employee productivity, a successful employment relationship, and a positive impact on your culture and total work environment.

1. Are you currently employed? If not, why did you leave your last job? If you are, why are you seeking a new employment opportunity?
2. What did you most enjoy about your last position?
3. What was your least favorite aspect of your last role?
4. What do you consider to be your 3 greatest strengths?
5. What do you consider to be an area that you need to improve upon?
6. In a perfect world, do you prefer to work independently or as part of a team?
7. Tell me about a time when you had a challenging experience with a boss or a colleague and how did you deal with it?
8. Do you make friends at work?
9. If you had the option to meet with a client in person or over the phone, what would you prefer and why?
10. If a client called screaming at you and was very unhappy, how would you handle the situation?
11. Do you have any opposition working overtime or weekends from time to time if we are working on time sensitive projects or need extra help?
12. If you could construct the perfect job for you, what would it be?
13. Based on what you know of the position, do have any reservations that this could be the right fit for you?
14. Where do you see yourself 5 years from now?
15. If you had to score yourself on a scale of 1 to 10 on your patience level- with 10 being very patient- how would you score yourself?
16. What do you value most and how do you exemplify that value in your life?
17. Tell me about a time that you attempted something and failed?
18. Tell me about one of your greatest accomplishments?
19. Do you have any personal development experience or done any training to support your personal growth?
20. Why are you interested in working for our company?
21. What are your salary/compensation requirements?
22. If we were to decide to work together, in what areas could I help you grow?
23. Is there any other information that you think would be valuable for us to know about you?
24. If we were to decide that you are the perfect fit, when would you be available to start?