

STEP 5: Refine your Plan

What methods will you use to track your efforts?

How often will you monitor your plan for effectiveness?

How many closed loans would you like to produce monthly?

Strengths:

Areas of Improvement:

Notes:

MGIC

SUCCESS
BEGINS WITH A
PLAN



STEP 1: Define you

Write your elevator pitch. Introduce yourself (name and title), write a summary of what you do, explain why you do it and end with a personal note.

STEP 2: Define your market

Where would you like to target your efforts?

List specific market characteristics.

STEP 3: Reach your market

How are you currently reaching your market with success?

In what ways will you expand your market outreach?

How will you continue to work with your current referral partners?

Where will you look to expand your outreach with new and current partners?

STEP 4: Turn lead into loans

How do you build trust with your borrowers?

What tools do you use to provide options to your borrowers?

What are your communication standards?