ABOUT THE PRODUCT

Sales Activities and Forecast Tracker (Lead/Sales Funnel Analysis)

In this stand-alone course we will review and understand your specific Financial Forensic which allows you to determine what activity levels (during Lead Generation/Sales Funnel) yield activity in credit orders and applications to generate a funded loan. You will learn how to structure your day, week, and month to keep you focused and disciplined in the areas most crucial to your business: the generation of clients and the creation of sales.

This coaching is delivered in focused one-on-one sessions. we will take a tactical approach to providing the solutions you want and need. As an example, we focus on solutions to questions like these:

- How long does it take once I contact a realtor for the first time to fund a loan?
- How many contacts/calls will I need to generate to funded loan from a digital social media post, or from any campaign, before the result is a funded loan?

This course provides answers and the tools to keep you on track to manage the sales funnel plans you define. The 6-month focused one-on-one customized session schedule includes:

- Month 1 – 2 sessions define sale/lead funnels
- Work the Plan months 2 thru 6 with monthly sessions to review actual to plan, adjust if needed
- Month 6 includes a formulation of base Financial Forensic Metrics

Includes access to Session Slides, Notes, and Videos as well as templates with a gross compensation tracker. Basic Excel instruction is provided. Participant will need access to Excel or Google Sheets

This is a focused, hands-on coaching. Success requires a 6-month commitment from both the coach and the participant. In the first two months, attention is focused on discovery and approach to create the plan. From month two, we begin to work within the plan, creating the work product, conducting check-ins, and adjusting as needed.

A committed participant will have a functional, proven work product at the end of the six months of focused attention. If desired, an extension and continuation of coaching is available for an additional six months at a reduced rate.

6 Seats Available.

Required 6-Month Focused Commitment: 6-month hands-on commitment learning and coaching to create and manage the work product. Participation is limited and payment is front-loaded due to the intense amount of preparation to create the work product. $2.499.50, one payment in full.
Optional 6-Month Extension: $250 / month for an additional 6-months providing for a full year of coaching to further define metrics over time.

ABOUT THE CONSULTANT

Andy comes to us with an extensive mortgage background of 20+ years creating partnerships at all levels in sales, operations, corporate executive and individual business entrepreneurs. He is formally trained earning a major in accounting and a minor in finance while contributing his skill with several Fortune 500 companies.

Focusing on client partner specific needs and levels of understanding while tailoring a solution that is easy to understand and follow. He truly believes in taking complex concepts and delivering in a manner that is understood at all levels from the novice to the seasoned veteran.

He prides himself in being able to speak the client's language and thus articulating appropriately. Andy's value is endless as he can apply knowledge from several business industries to assist you in creating, monitoring, analyzing and adjusting business plans as needed in order to achieve your goals. He possesses the unique ability to live and work in the details while keeping focused on vision and goals. He compares himself to you having the power of a successful Fortune 500 company accounting and finance department, your CFO at a fraction of the cost. Most of all the training, tools and value received will benefit you for many years to come.