

90 DAY LO RESET

BUSINESS BASELINE | DAY 1

Capture the facts as they are today - not where you think they should be. We will use this Day 1 baseline to identify priorities and measure progress throughout your Reset.

Loan Officer: _____

Date: _____

Company/Branch: _____

1. PRODUCTION *What is your current production picture?*

BASILINE ITEM	DAY 1
Closed units - trailing 12 months	_____
Closed loan volume - trailing 12 months	_____
Average monthly closed units - recent 3 months	_____
Average monthly loan volume - recent 3 months	_____
Loans currently in process / current pipeline	_____
90-day production goal - units	_____
90-day production goal - volume	_____
90-day income / commission goal	_____

2. OPPORTUNITIES *What business is already within reach?*

BASILINE ITEM	DAY 1
Active pre-qualified borrowers	_____
Active new leads	_____
Older leads that still require follow-up	_____
Approximate database size	_____
Opportunities you believe could close in the next 90 days	_____
Primary source of your current leads	_____

3. RELATIONSHIPS *Who is creating or capable of creating business with you?*

BASILINE ITEM	DAY 1
Active referral partners	_____
Prospective referral partners currently being pursued	_____

Past referral relationships worth re-engaging	_____
Primary source of closed business over the last 12 months	_____
Relationship category with the greatest untapped opportunity	_____

4. ACTIVITY *What are you consistently doing to create future business?*

BASELINE ITEM	DAY 1
Days per week you currently prospect	_____
Approximate hours per week spent on business development	_____
Current lead follow-up frequency / process	_____
Protected prospecting time on calendar? Yes / No / Sometimes	_____
Regular pipeline review? Yes / No / Sometimes	_____
Business-development activities you perform consistently	_____

DAY 1 REFLECTION

What appears strongest in your business right now?

Where do you believe the greatest opportunity is being lost?

What feels the most disorganized or inconsistent?

If you could improve ONE thing over the next 90 days, what would have the greatest impact on production?

Bring this completed worksheet to your first Reset Strategy Session.