

90 DAY LO RESET

WHAT'S ACTUALLY BREAKING YOUR PIPELINE?

LO PRODUCTION ASSESSMENT

Production problems are not always caused by a lack of leads. This assessment helps identify where your business is working and where it may be breaking down. Rate yourself based on what you are actually doing today - not what you know you should be doing.

Loan Officer: _____

Date: _____

HOW TO SCORE

Circle or enter one score for each statement: 1 = Rarely/Never 2 = Inconsistent 3 = Sometimes 4 = Usually 5 = Consistently

1. PROSPECTING CONSISTENCY

STATEMENT	1-5
I have scheduled, protected time for prospecting/business development.	_____
I prospect consistently even when my current pipeline is busy.	_____
I know which prospecting activities I am expected to complete each week.	_____
I track whether I actually complete my prospecting commitments.	_____
CATEGORY TOTAL: _____ / 20	

2. LEAD CONVERSION

STATEMENT	1-5
I respond to new leads quickly and consistently.	_____
I have a clear process for moving leads toward an application or pre-qualification.	_____
I know where my leads are coming from and which sources convert best.	_____
I regularly review leads that have not yet converted and decide the next action.	_____
CATEGORY TOTAL: _____ / 20	

3. REFERRAL PARTNER DEVELOPMENT

STATEMENT	1-5
I have a clearly identified list of active referral partners and high-potential prospects.	_____
I consistently initiate conversations with referral partners and prospects.	_____
I follow a repeatable relationship-building plan instead of relying on occasional contact.	_____

I can identify which referral relationships deserve more attention and which do not.

CATEGORY TOTAL: _____ / 20

4. FOLLOW-UP

STATEMENT

1-5

Every active lead, pre-qual, prospect, or opportunity has a clear next action.

I follow up consistently rather than only when I remember or have extra time.

I continue appropriate follow-up when someone does not respond immediately.

I regularly revisit older leads, past clients, and relationships that may still create business.

CATEGORY TOTAL: _____ / 20

5. PIPELINE MANAGEMENT

STATEMENT

1-5

I can quickly see the status of every loan, pre-qual, lead, and active opportunity.

My pipeline information is kept current in one reliable system.

I review my pipeline on a consistent schedule.

I use my pipeline to anticipate future production rather than only manage current transactions.

CATEGORY TOTAL: _____ / 20

6. TIME & CALENDAR DISCIPLINE

STATEMENT

1-5

My calendar reflects the activities that are most important to future production.

I protect business-development time from routine interruptions whenever possible.

I begin most workdays knowing my highest-priority activities.

I adjust my calendar when business gets busy without abandoning the activities that create future business.

CATEGORY TOTAL: _____ / 20

7. MESSAGING & SCRIPTS

STATEMENT

1-5

I feel prepared to start conversations with referral partners, prospects, leads, and past clients.

I can explain my value clearly without relying only on rates or products.	_____
I adjust my messaging based on current market conditions and the person I am speaking with.	_____
I know how to follow up or continue the conversation when the first outreach does not create an immediate result.	_____

CATEGORY TOTAL: _____ / 20

8. BUSINESS FOCUS

STATEMENT	1-5
I know which activities have the greatest impact on my production.	_____
I can distinguish productive activity from work that simply keeps me busy.	_____
I follow a clear business plan instead of frequently changing direction.	_____
I can identify the one or two priorities that deserve my attention right now.	_____

CATEGORY TOTAL: _____ / 20

YOUR SCORECARD

BUSINESS AREA	SCORE
Prospecting Consistency	_____ / 20
Lead Conversion	_____ / 20
Referral Partner Development	_____ / 20
Follow-Up	_____ / 20
Pipeline Management	_____ / 20
Time & Calendar Discipline	_____ / 20
Messaging & Scripts	_____ / 20
Business Focus	_____ / 20
TOTAL PRODUCTION ASSESSMENT	_____ / 160

BEFORE YOUR RESET STRATEGY SESSION

My strongest area appears to be:

My weakest area appears to be:

The area I believe is hurting my production most is:

The area I most want help with is:

RESET PRIORITY - COMPLETE WITH YOUR COACH

Your lowest score is not automatically your first priority. We will review this assessment alongside your Business Baseline and determine where focused change is most likely to improve your production.

Primary Reset Constraint: _____

First 30-Day Priority: _____

First Action to Stack: _____