DES COACHING

90 DAY LO RESET

90-DAY PRODUCTION TARGET

Turn the goal into a number we can build toward.

Use your Week 1 Business Baseline as your starting point. This worksheet is not your full business plan. It establishes the production result you want to create over the next 90 days and helps us see the gap between your current pace and your target.

Loan Officer: ___________________________ **Date:** ________________

1. START WITH YOUR CURRENT PACE *Bring forward the numbers from your Business Baseline.*

MEASURE	AMOUNT
Average monthly closed units - recent 3 months	_______________
Average monthly closed loan volume - recent 3 months	_______________
Average monthly gross commission / income - recent 3 months	_______________
Loans currently in process / current pipeline	_______________
Active pre-qualified borrowers	_______________

2. SET YOUR 90-DAY TARGET *What result are you building toward?*

MEASURE	AMOUNT
Target closed units - next 90 days	_______________
Target closed loan volume - next 90 days	_______________
Target gross commission / income - next 90 days	_______________
Average monthly units required to reach target	_______________
Average monthly volume required to reach target	_______________

3. SEE THE GAP *Compare your current pace with the target.*

GAP MEASURE	AMOUNT
Current 3-month pace - projected units over 90 days	_______________
Additional units needed to reach target	_______________
Current 3-month pace - projected volume over 90 days	_______________

Additional volume needed to reach target	______________

4. WHERE COULD THE BUSINESS COME FROM? *Estimate opportunity - do not turn this into an action plan yet.*

POTENTIAL SOURCE	ESTIMATE
Current pipeline likely to close during the next 90 days	______________
Current pre-quals with realistic 90-day potential	______________
Active leads with realistic 90-day potential	______________
Existing referral partners - potential new opportunities	______________
Past clients / database - potential opportunities	______________
New referral / prospecting business that may be needed	______________

5. REALITY CHECK *Use the numbers, not wishful thinking.*

Is this target higher than my current pace? Yes / No
Do I have enough existing opportunity to support the target? Yes / No / Not Yet Clear
Will this target require new business-development activity? Yes / No
What assumption in this target feels least certain?

____

6. MY 90-DAY PRODUCTION COMMITMENT

Over the next 90 days, my target is to close _____ units totaling approximately $______________ in loan volume and generate approximately $______________ in gross commission / income.

The most important thing I need to understand or solve in order to reach this target is:

____
____

COACHING REVIEW *Complete together during your coaching session.*

Target confirmed / adjusted to: ____

Primary source(s) expected to support the target: ____

Key gap we need to close: ____

Next planning step: ____

Your target gives us direction. Your actions will determine whether we reach it.