

90 DAY LO RESET

90-DAY BUSINESS PLAN

Build the business behind the production target.

You have established the production result you want to create. Now choose the few business priorities most likely to support that target. You do not need a goal in every category. Focus is part of the Reset.

Loan Officer: _____

Date: _____

1. BRING FORWARD YOUR PRODUCTION TARGET *Use the target you established in Lesson 1.*

90-day closed-unit target:

90-day loan-volume target:

90-day gross commission / income target:

2. PRODUCTION & PIPELINE *What must improve in the flow of business from opportunity to closing?*

My priority goal in this area is:

Why this matters to my 90-day target:

How I will know this area is improving:

3. DATABASE & PAST CLIENTS *What opportunity already exists in the relationships and contacts you have?*

My priority goal in this area is:

Why this matters to my 90-day target:

How I will know this area is improving:

4. REFERRAL PARTNERS *What relationships need to be strengthened, re-engaged, or developed?*

My priority goal in this area is:

Why this matters to my 90-day target:

How I will know this area is improving:

5. LEAD GENERATION & MARKETING *What must consistently create new conversations and opportunities?*

My priority goal in this area is:

Why this matters to my 90-day target:

How I will know this area is improving:

6. PROFESSIONAL DEVELOPMENT *What skill, knowledge, or capability would make you more effective?*

My priority goal in this area is:

Why this matters now:

7. PERSONAL / BUSINESS SUSTAINABILITY *What needs to change so you can perform consistently without running yourself into the ground?*

My priority goal in this area is:

Why this matters now:

8. CHOOSE YOUR RESET PRIORITIES *Do not try to fix everything at once.*

Review the goals above. Circle or identify no more than THREE priorities that deserve focused attention during this Reset.

Priority #1:

Priority #2:

Priority #3:

What are you intentionally NOT prioritizing right now?

COACHING REVIEW *Complete together during your coaching session.*

Priorities confirmed / adjusted to:

What can wait:

Biggest risk to this plan:

Next step - move these priorities into the Action Builder:
