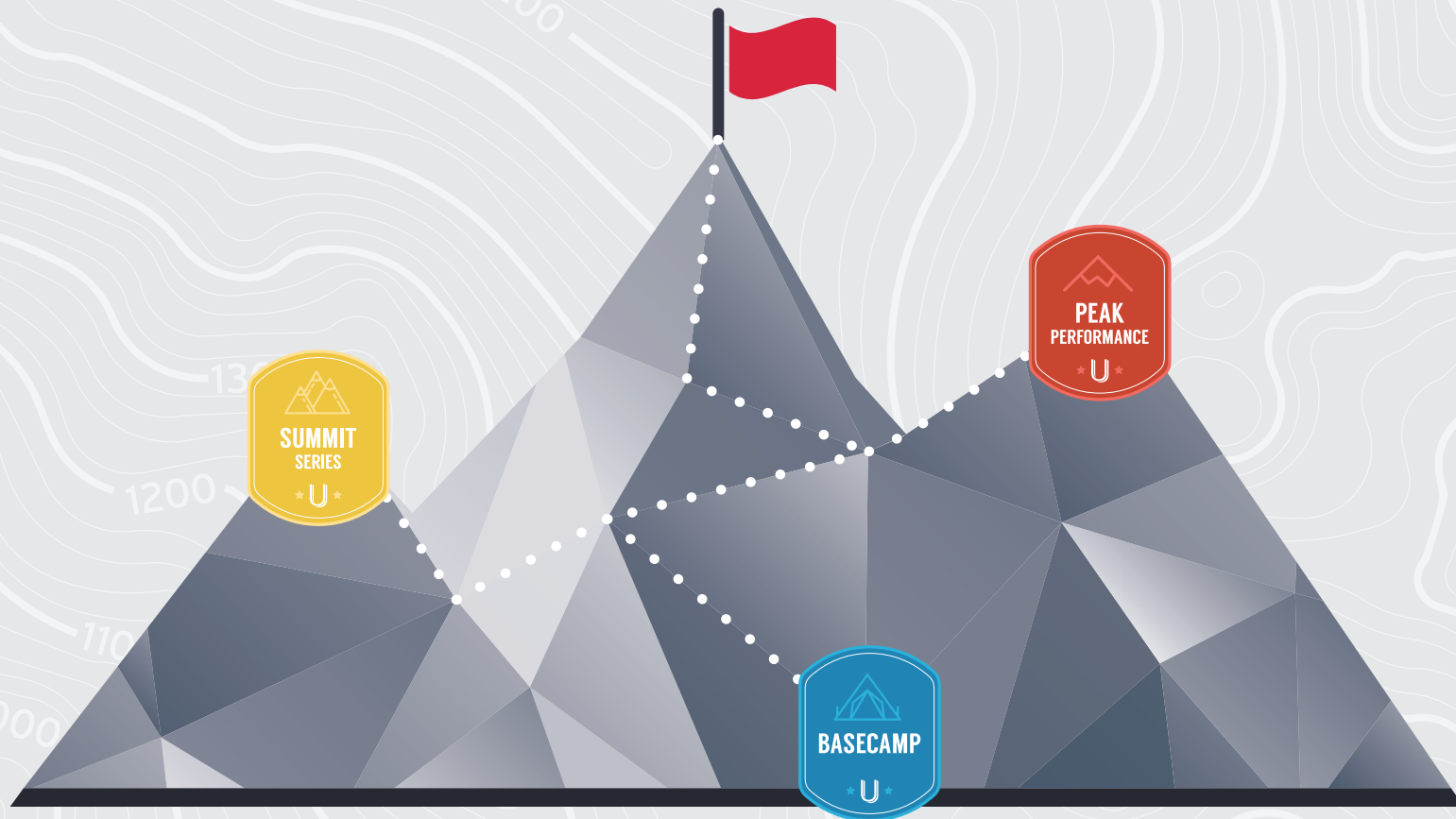


USHERPA

MASTER ASCENT PLAN





FIELD GUIDE FOR SUCCESS

WEEK OF _____

MON

TUE

WED

THURS

FRI

☐ Schedule Your Weekly Tasks

☐ Make Loan in Process update calls ^U

☐ Call Pre-quals and "0-60 Day" Prospects ^U

☐ Call "Tier 1" Prospective Realtors

☐ Call Builder, Other Referral Partners and Groups

☐ Call Birthdays ^U

☐ Call Birthdays ^U

☐ Call Birthdays ^U

☐ Call Birthdays ^U

☐ Call Birthdays ^U

☐ Call Annual Loan Checkups ^U

☐ Call Annual Loan Checkups ^U

☐ Call Annual Loan Checkups ^U

☐ Call Annual Loan Checkups ^U

☐ Call Annual Loan Checkups ^U

☐ Create & Complete Tasks

☐ Create & Complete Tasks

☐ Create & Complete Tasks

☐ Create & Complete Tasks

☐ Create & Complete Tasks

☐ Call Other Alerts

☐ Call Other Alerts

☐ Call Other Alerts

☐ Call Other Alerts

☐ Call Other Alerts

☐ Review Usherpa Email Analytics & Dashboard

☐ Review Usherpa Email Analytics & Dashboard

☐ Review Usherpa Email Analytics & Dashboard

☐ Review Usherpa Email Analytics & Dashboard

☐ Review Usherpa Email Analytics & Dashboard

Notes: _____

Notes: _____

Notes: _____

Notes: _____

Notes: _____

DAILY WINS

WEEKLY GOALS

Face to Face Meetings

New Realtors added to Usherpa

✓ Thank You Notes ^U

Social Media Posts ^U

Quality Conversations - Document in Usherpa with follow up tasks

✓ Review Week and Set Goals for Next Week



FIELD GUIDE FOR SUCCESS

MONTH OF _____

EVERY OTHER WEEK

WEEK OF _____

- ☐ Call "60 - 90 Day" Prospects
- ☐ Call "Tier 2" Realtors
- ☐ Mine Database for Opportunities

WEEK OF _____

- ☐ Call "60 - 90 Day" Prospects
- ☐ Call "Tier 2" Realtors
- ☐ Mine Database for Opportunities

MONTHLY GOALS



Call "90+ Days" Prospects



Call "Tier 3" Realtors



Conduct Knowledge Building Activities Like:

- ☐ Read a business book
- ☐ Attend an event
- ☐ Read Usherpa Whitepapers and LO Interviews



Realtor Database Clean Up

- ☐ Make sure database is up to date with new Realtors
- ☐ Remove old Realtors
- ☐ Make sure database is up to date with correct addresses, email addresses and phone numbers



Review previous month

- Review Reports on Usherpa Dashboard
- See how you did on your Daily Wins and against your production goals



FIELD GUIDE FOR SUCCESS

YEAR _____

QUARTERLY GOALS

Q1

- ☐ Set production goals
- ☐ Send direct mail (optional) **U**
 - Quarterly to all previous Customers
 - 8-12 times a year to top 25% of Customers or "Advocates"
- ☐ Database Clean Up
 - Customers, Prospects, Business Partners
- ☐ Review previous quarter
 - Did you make your Daily Wins and production goals?

GOAL: _____

ACTUAL: _____

Q2

- ☐ Set production goals
- ☐ Send direct mail (optional)
 - Quarterly to all previous Customers
 - 8-12 times a year to top 25% of Customers or "Advocates"
- ☐ Database Clean Up
 - Customers, Prospects, Business Partners
- ☐ Review previous quarter
 - Did you make your Daily Wins and production goals?

GOAL: _____

ACTUAL: _____

Q3

- ☐ Set production goals
- ☐ Send direct mail (optional)
 - Quarterly to all previous Customers
 - 8-12 times a year to top 25% of Customers or "Advocates"
- ☐ Database Clean Up
 - Customers, Prospects, Business Partners
- ☐ Review previous quarter
 - Did you make your Daily Wins and production goals?

GOAL: _____

ACTUAL: _____

Q4

- ☐ Set production goals
- ☐ Send direct mail (optional)
 - Quarterly to all previous Customers
 - 8-12 times a year to top 25% of Customers or "Advocates"
- ☐ Database Clean Up
 - Customers, Prospects, Business Partners
- ☐ Review previous quarter
 - Did you make your Daily Wins and production goals?

GOAL: _____

ACTUAL: _____

ANNUAL GOALS

GOAL: _____



Review previous year

GOAL: _____



Write New Year business plan

GOAL: _____





FIELD GUIDE FOR SUCCESS

SELF ASSESSMENT FOR

On a scale from 1 - 10 (10 being the highest) how well are you doing in the areas below?

YOUR NETWORK

- ☐ Referral Partners (Realtors, Builders, Other)
- ☐ Past Customers
- ☐ Loan In Process Borrowers
- ☐ Prospects
- ☐ Other _____

ACTIVITIES

- ☐ Using Call Alerts
- ☐ Creating Groups
- ☐ Connecting with In Process Borrowers
- ☐ Using Notes & Task Features
- ☐ Mining Your Database for Opportunities
- ☐ Cleaning Your Database

OTHER ACTIVITIES

- ☐ Networking Events
- ☐ Knowledge Building
- ☐ Posting on Social Media
- ☐ Other _____

What are your barriers to improving in the areas that you feel will have the most impact on your business?

What are the most important things that your Usherpa Guide can help you with?
