



# GENEVA FINANCIAL MORTGAGE

CASE STUDY

The  
Ultimate  
Business  
Partners.

# GENEVA FINANCIAL'S PROBLEM

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A Branch Manager of Geneva Financial reached out to UBP because he wanted help in building systems that would keep him accountable to meeting new Realtors and maintaining the ones he already had. His main challenge is that he is remote and works from his home most of the time. Even though he is a smart loan officer with over 18 years of experience, he felt like he did not know where to start and was unsure of how to approach agents he did not know.



# OUR SOLUTION AND RESULTS

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UBP coached him on the Accounts Pyramid TM, the Loan Officer Roadmap to Success, and the Perfect Week Scorecard TM. We also created and practiced scripts for calling Realtors, Financial Advisors, CPA's and Trust Attorneys.

During the first 60 days, his confidence grew and he was scheduling meetings with new referral partners. During one of those meetings, he was introduced to another Realtor, who introduced him to a team of 6. The team of 6 Realtors was having a tough time with their current loan officer because of closing delays and they were looking for a new option.

Talk about being in the right place at the right time. Since then, our client has cemented himself as the go-to consultant with this group of 6 as well as with 4 other Realtors in his area. Within 6 months he was getting business from 10 referral partners who never referred him before.

During the crazy 2022 rate increase, he was able to maintain production by doing the Accounts Pyramid Cleanse TM and quarterly F5 Goals TM. Unlike most of the other Loan Officers whose business dropped by 50 - 60%, he was only down 18% and in Q4 of 2022, he is still enjoying a steady stream of referrals from his new Realtor Clients.



# SUMMARY

## PRE-ULTIMATE BUSINESS PARTNERS

FELT LIKE AN ISLAND, WORKING REMOTELY, WITH NO ONE TO HOLD HIM ACCOUNTABLE OR SHARE IDEAS WITH.



CALL RELUCTANCE BECAUSE HE DID NOT HAVE A CLEAR PLAN



NOT ACQUIRING NEW REFERRAL PARTNERS



## POST-ULTIMATE BUSINESS PARTNERS

USED THE UBP SCRIPTS TO SCHEDULE APPOINTMENTS WITH NEW REFERRAL PARTNERS



USED THE UBP PERFECT REALTOR MEETING™ OUTLINES TO PRESSURE TEST AND GET REFERRALS RIGHT AWAY



ACQUIRED 10 NEW REFERRAL PARTNERS IN 6 MONTHS



HAS A QUARTERLY PLAN USING THE F5 GOALS, THIS ALLOWS HIM TO MEASURE HIS ACTIVITIES AND ENSURE HE IS DOING THE RIGHT THINGS IN ORDER TO GET BUSINESS.



IMPLEMENTS THE REFERRAL PARTNER CALCULATOR™ AND ACCOUNTS PYRAMID CLEANSE™ TO GROW HIS NON-REALTOR REFERRAL NETWORK.

