Core7 Referral System

QuickStart Checklist

THE CORE7 MASTERMIND GROUP

☐ **Invite current professional relationships to join your Core7 Mastermind Group.**

- It is suggested that you have at least 4 professionals in place before starting your Core7 Mastermind meetings. Inform Core7 once you have this number to begin receiving your meeting Agendas and materials.
- Implementing the Core7 System with your current partners will enhance your relationships and productivity.

☐ **Recruit new professional relationships, if necessary, to fill/join your group (see Recruitment Package)**

- Use the Recruitment Package to help find the best qualified professionals to build your group correctly from the start. *VERY IMPORTANT

GROUP MEETINGS & ONE ON ONE PARTNERSHIP PLANNING SESSIONS

☐ **Schedule the Mastermind Meeting**

1. Monthly: Mastermind Meeting

- All group members attend.
- This meeting follows steps outlined in the Core7 Agenda

☐ **Schedule the One-on-One Partnership Planning meetings based on the professionals' calendars.**

2. Twice Monthly: One-on-One Partnership Planning Sessions

- These meetings have a deeper focus regarding specific topics pertinent to the professionals attending. e.g. the Lender and Realtor would discuss client introductions
- Use the Partnership Planning Questions and topics assigned by the Core7 Mastermind Meeting Agendas for the meeting format.
- These sessions can be done by phone or conference call, but an in-person format is recommended

LEARN YOUR REFERRAL SCRIPTS & PRIMARY REFERRAL TARGETS

☐ **Learn your scripts and referral targets.**

- Each professional has specific referral targets and scripts that are monitored during Mastermind Meetings. There are also email versions, but voice to voice communication is recommended.
- These targets are predictable, accountable, and systematic.

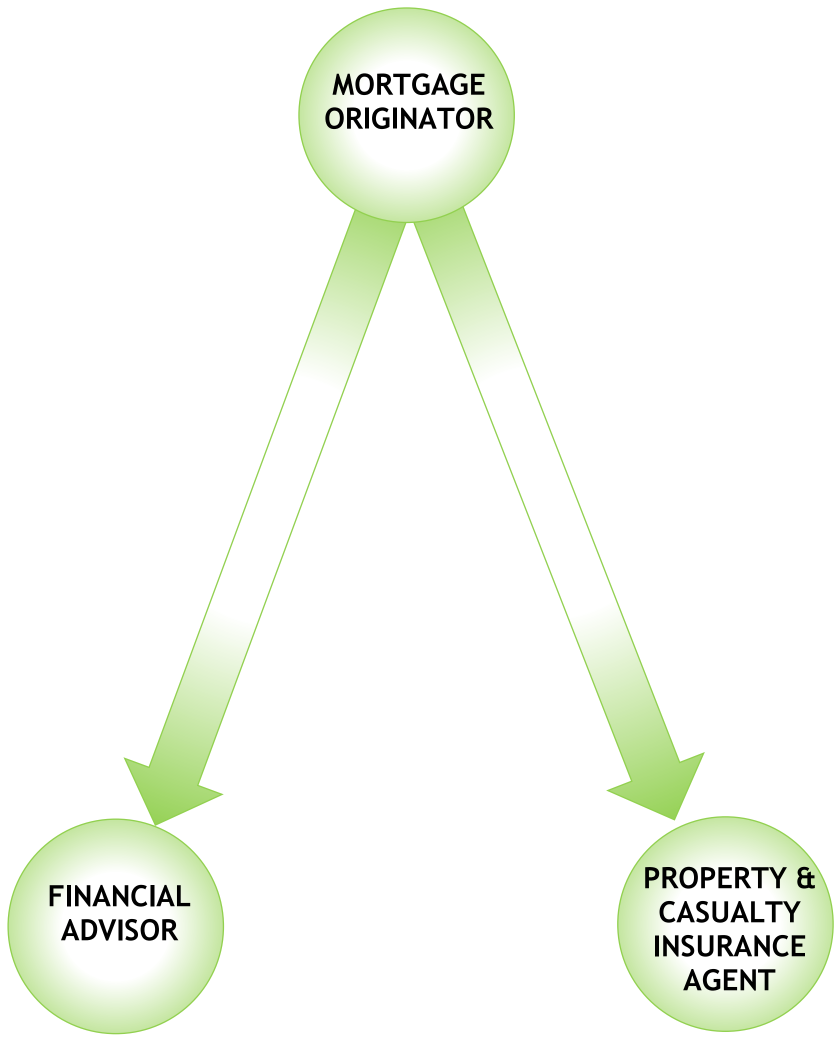
☐ **Listen to the Referral Targets module and learn the primary and secondary referral targets for your profession.**

- The next pages outline primary referral targets & scripting to be used by each professional to create referral introductions.
- Also listed are timestamps identifying the specific location of this information. Links are also included in each of the monthly Mastermind Assignments.

☐ **Review Primary Referral Target Scripts & Emails**

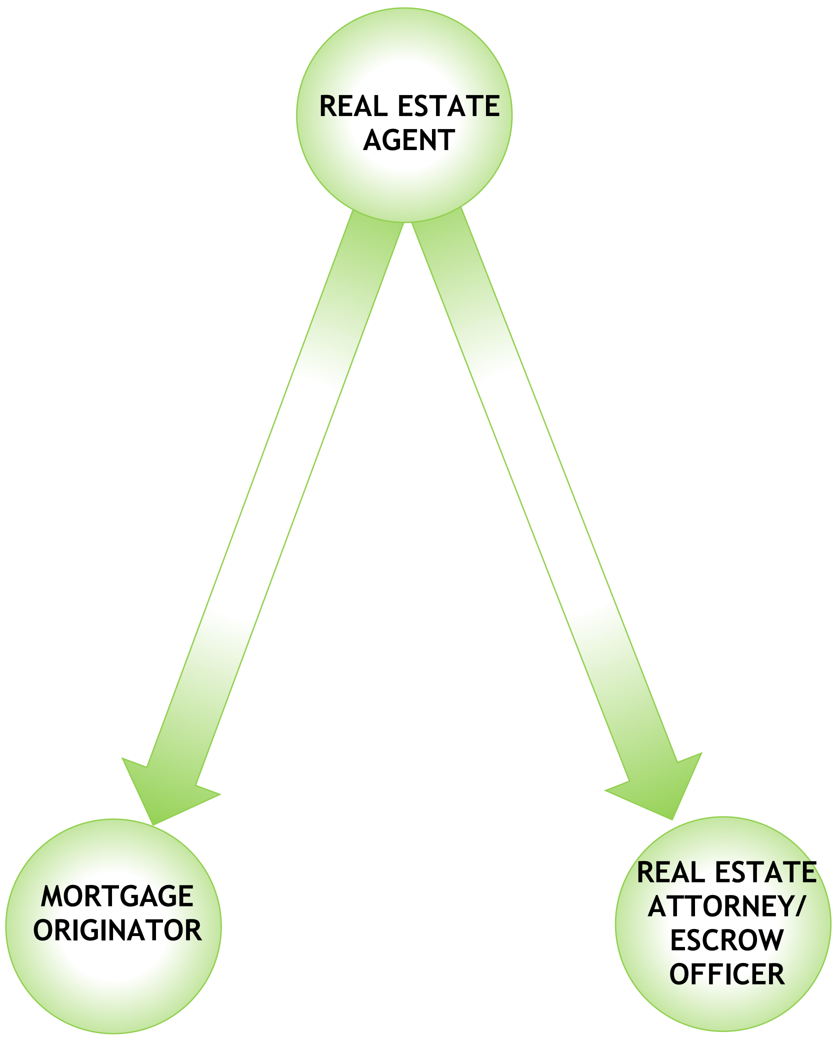
LEARN YOUR REFERRAL SCRIPTS & PRIMARY REFERRAL TARGETS

PRIMARY REFERRAL TARGETS FOR MORTGAGE ORIGINATOR



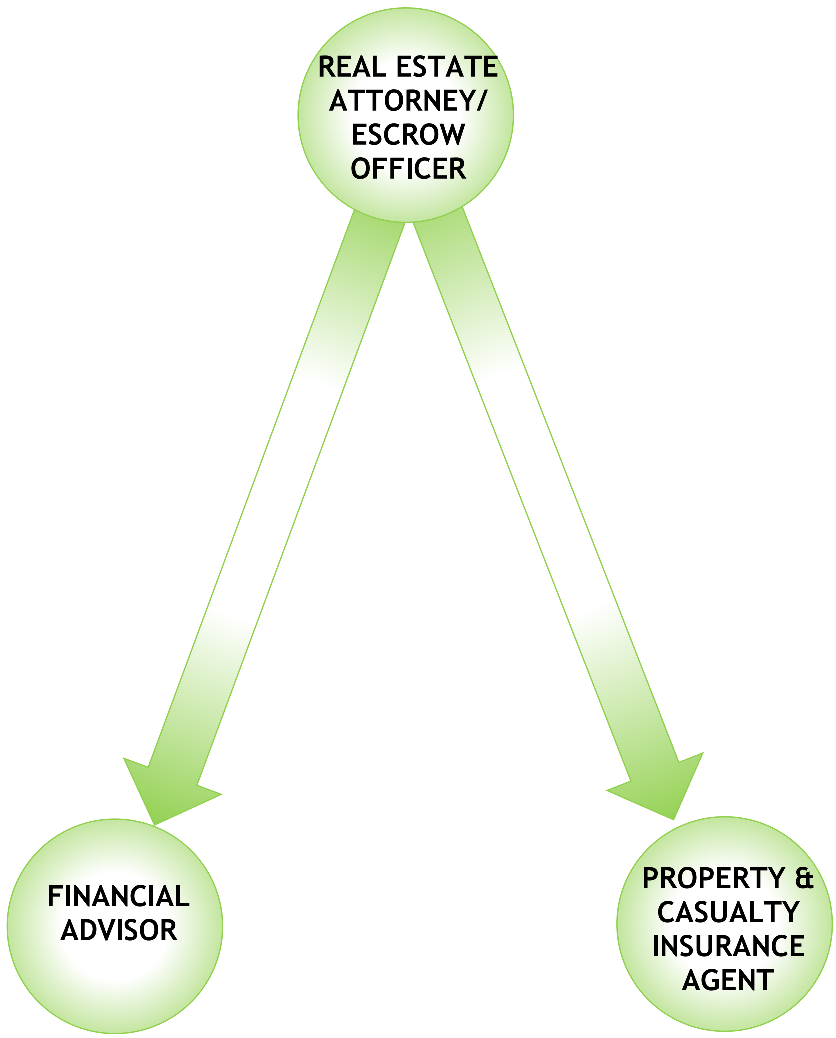
LEARN YOUR REFERRAL SCRIPTS & PRIMARY REFERRAL TARGETS

PRIMARY REFERRAL TARGETS FOR
REAL ESTATE AGENT



LEARN YOUR REFERRAL SCRIPTS & PRIMARY REFERRAL TARGETS

PRIMARY REFERRAL TARGETS FOR REAL ESTATE ATTORNEY/ ESCROW OFFICER



LEARN YOUR REFERRAL SCRIPTS & PRIMARY REFERRAL TARGETS

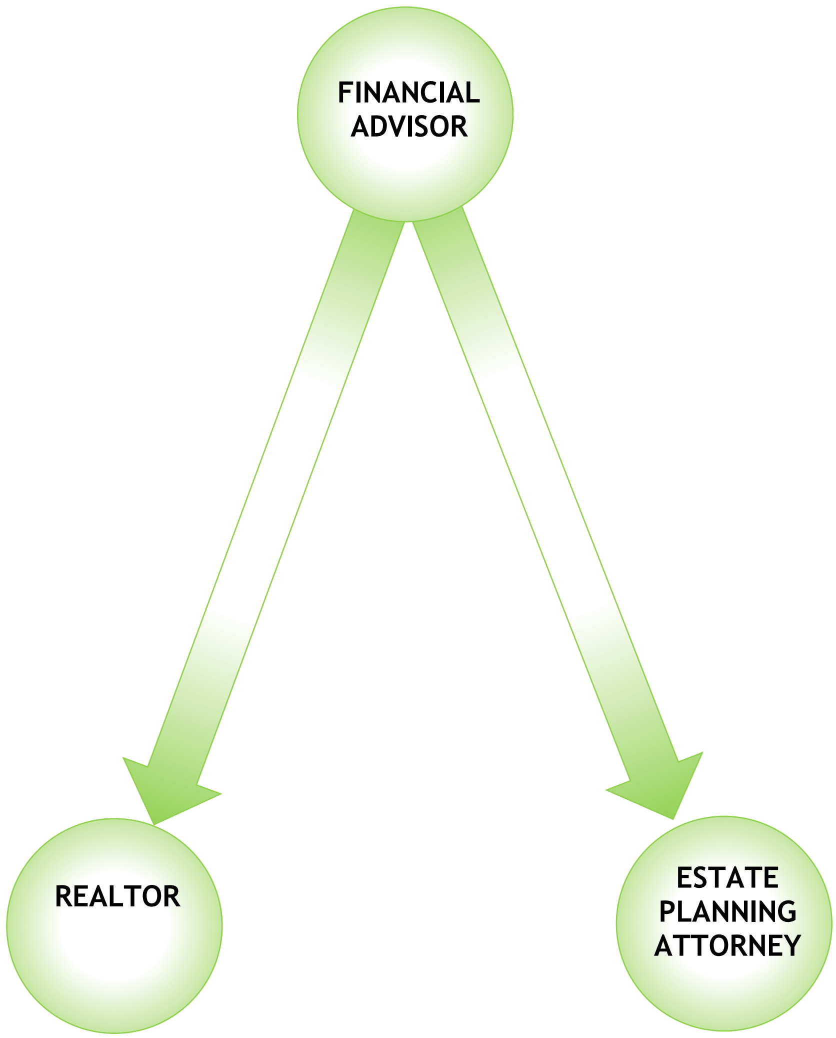
THE FINANCIAL PROFESSIONALS

(P&C Insurance Agent, Financial Advisor, Accountant & Estate Planning Attorney)

NOTE: The information below outlines an important principal that must be understood before reviewing the primary referral targets for the P&C, Accountant, Financial Advisor & Estate Planning Attorney

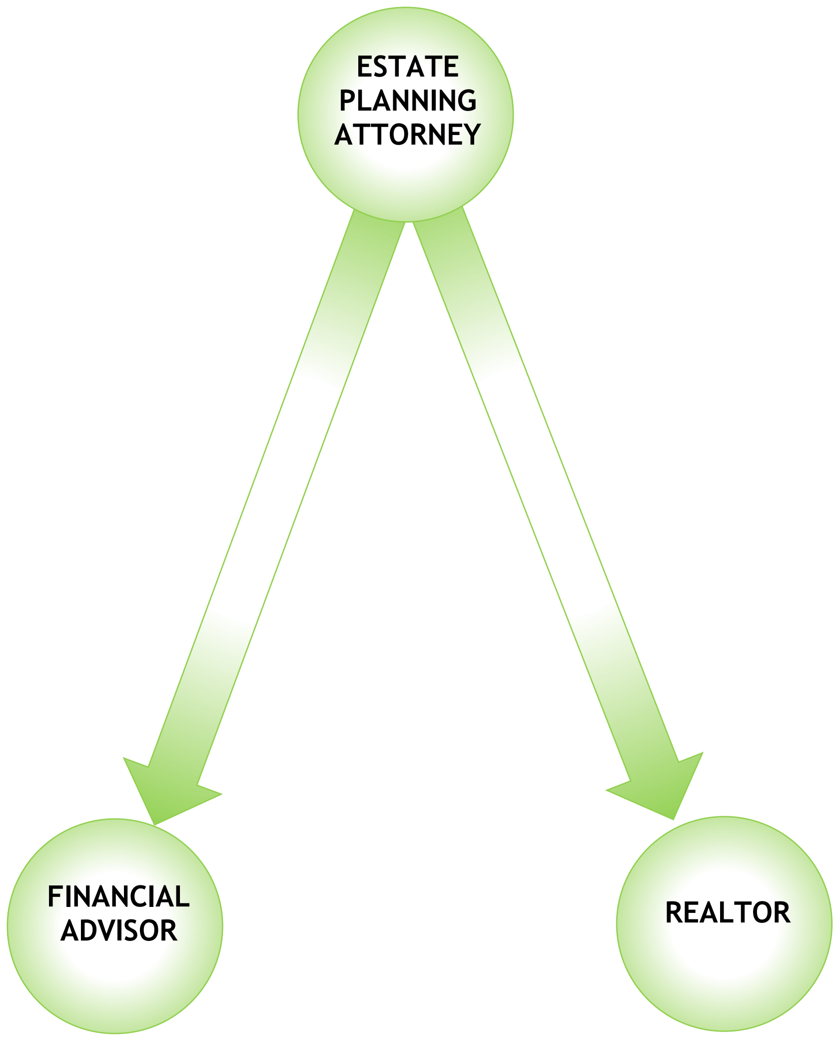
LEARN YOUR REFERRAL SCRIPTS & PRIMARY REFERRAL TARGETS

PRIMARY REFERRAL TARGETS FOR FINANCIAL ADVISOR



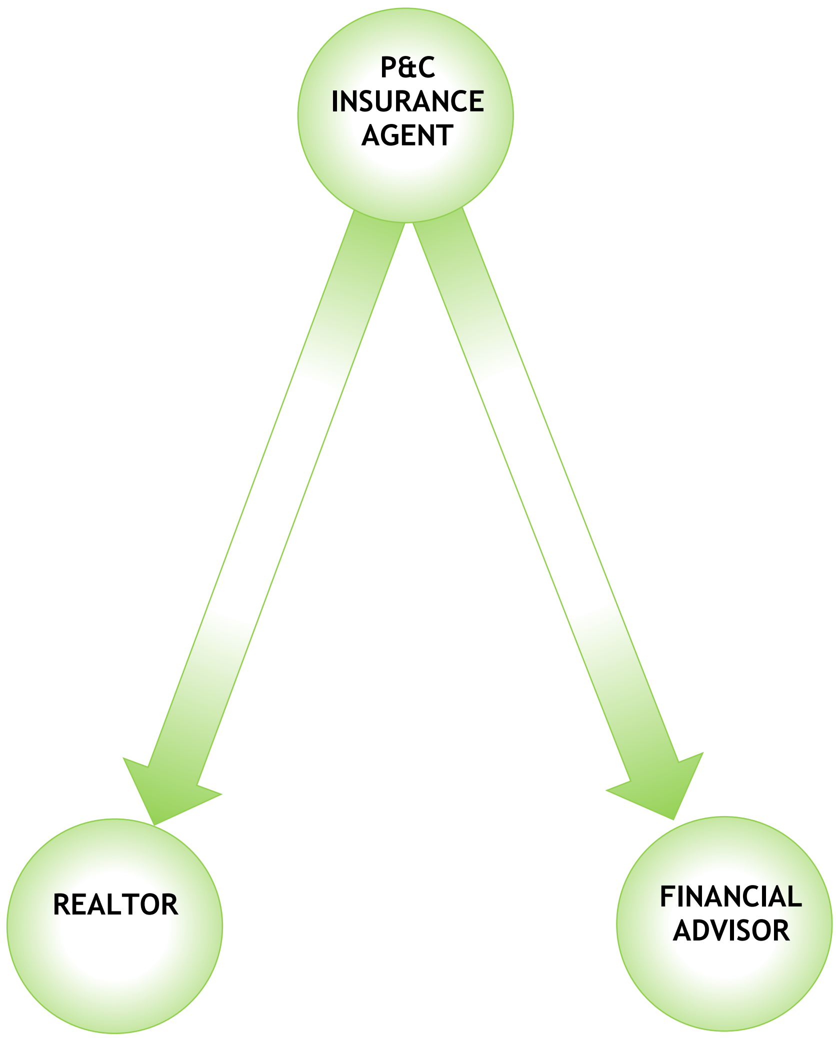
LEARN YOUR REFERRAL SCRIPTS & PRIMARY REFERRAL TARGETS

PRIMARY REFERRAL TARGETS FOR
ESTATE PLANNING ATTORNEY



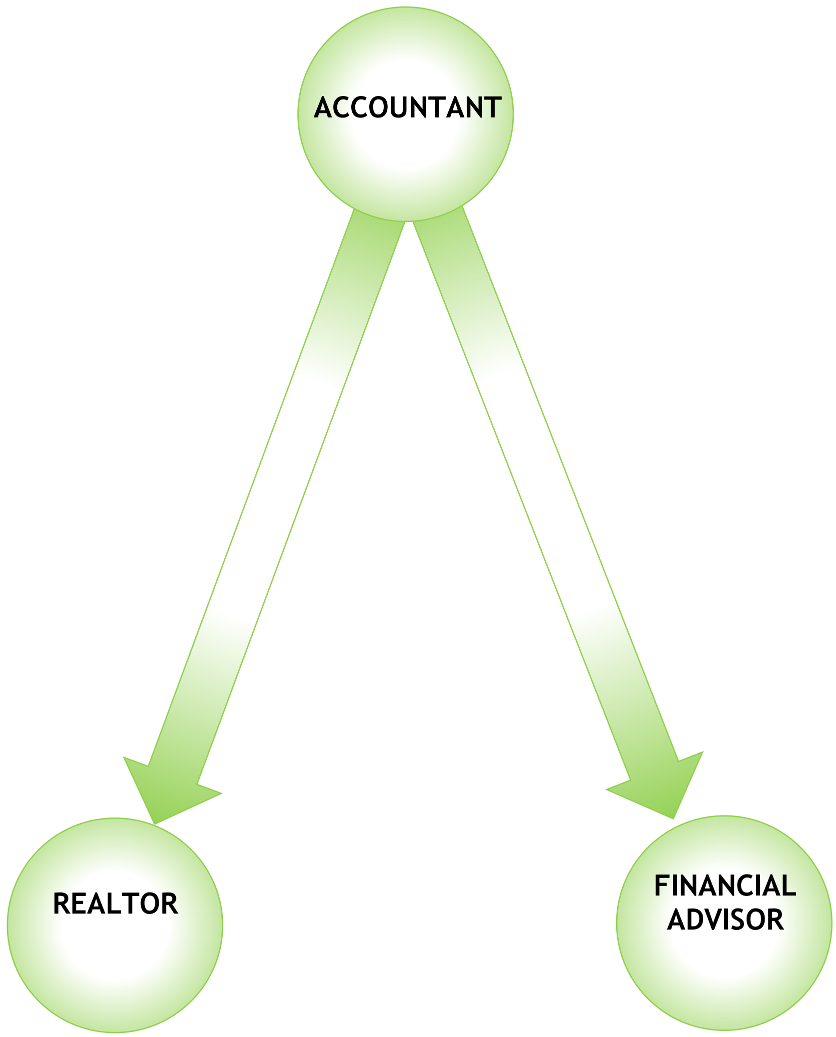
LEARN YOUR REFERRAL SCRIPTS & PRIMARY REFERRAL TARGETS

PRIMARY REFERRAL TARGETS FOR
P&C INSURANCE AGENT



LEARN YOUR REFERRAL SCRIPTS & PRIMARY REFERRAL TARGETS

PRIMARY REFERRAL TARGETS FOR ACCOUNTANT



MATERIALS FOR MASTERMIND &
1-on-1 PARTNERSHIP PLANNING SESSIONS

These items are sent to each professional prior to monthly meetings*:

- **The Lead Tracker**
    - To be completed before the Mastermind Meeting
    - Prepares you for the Referral Tracking portion of the meeting.

Real Estate Attorney Lead Tracker

Mo.	Name	New	Existing	Source	Result of Cross Sell:			Notes
					F.A.	P&C	Other	

MATERIALS FOR MASTERMIND &
1-on-1 PARTNERSHIP PLANNING SESSIONS

- **The Guest Reminder**
    - A reminder to invite a guest to every meeting.
        - Invite Core7 Professionals until your group is complete. Then invite non-Core7 professionals.
    - Includes copy/paste script.
    - Copy & Paste into an email to be sent to your mailing list, social networks, etc.

Recruiting a Guest to Speak at the next Mastermind Group Meeting. (Email Blast to Social Media Channels)

(Prospecting Letter/Email to speak at Core7 Mastermind Group Meeting)

Dear ___________,

I'm writing to ask you a favor. I was wondering if you know a ____________________ who would be interested in speaking at our next Core7 Mastermind Group Meeting. It will be valuable for all parties involved.

My networking group is always looking for quality professionals that we can refer our clients to when they need help. If you know a __________________ that would be interested, please let me know their email address or make the introduction.

Thank You,

MATERIALS FOR MASTERMIND &
1-on-1 PARTNERSHIP PLANNING SESSIONS

- ### Mastermind Agenda & Cheat Sheet
  - Includes the Core7 lesson and the One-On-One Partnership Planning assignments

☐ **SELECT A GROUP LEADER**

- The group leader runs the Mastermind Meeting and keeps everyone on point with the Agenda

☐ **SELECT A TIMER**

- The timer monitors each Agenda section

☐ **READ THE CORE7 COMMITMENT**

- At Core7, we believe reading the Core7 Commitment out load transforms individuals into a team.
- A copy of the Core7 Commitment is located in the Mastermind Meeting Agenda.

☐ **What's New and Positive & Who Do I Need to Meet? (VERY IMPORTANT!)**

- Each professional is allowed a specific amount of time allotted in the Agenda to discuss something new and positive in their business
- Each professional let's group members know who they would like to meet (specific needs or business-to-business referrals)
- Focus only on the positive. At Core7, we feel a negative focus will not be productive.
- A cornerstone of Core7 is the belief that helping your partners succeed is smart business. The more you trust and support your partners, the more they will trust and support you.
- We believe in abundance versus scarcity. Supporting our partners' efforts increases, rather than decreases, our own success.

MATERIALS FOR MASTERMIND &
1-on-1 PARTNERSHIP PLANNING SESSIONS

☐ **The group leader asks each professional for the number of referrals given and updates the tracking matrix in the Mastermind Group Agenda.**

- Prior to a Mastermind Meeting, each member should complete the Lead Tracker sent out by Core7
- The Lead Tracker highlights primary target referral successes and organizes any other referrals given or received

☐ **The group leader asks the professional receiving the referral if contact was made and updates the tracking matrix in the Mastermind Group Agenda.**

- Check the appropriate box <u>if contact was made</u> regardless of conversion.

MATERIALS FOR MASTERMIND &
1-on-1 PARTNERSHIP PLANNING SESSIONS

- ### THE HOT SEAT

☐ **Select a professional for the hot seat.**

☐ **Ask specific hot seat questions:**

- What am I doing that you would like me to stop?
- What am I doing that you would like me to do more?
- How can I improve?

In this step, members give constructive feedback to help the individual and the group. A different Core7 professional takes the Hot Seat at each meeting. At Core7, we feel this approach helps members stay constructive in their feedback, as they know they are held to the same standard.

☐ **Assigned member teaches assigned lesson.**

- Each month, group members receive a lesson and one professional is assigned to lead the class.
  - Example: the process used when first meeting a client led by the Financial Advisor.

☐ **Discuss the lesson as a group.**

MATERIALS FOR MASTERMIND &
1-on-1 PARTNERSHIP PLANNING SESSIONS

- ### GUEST PRESENTATION

☐ **Core7 professionals should reach out to their network for professionals who may be interested in joining the group.**

- Each month, a new guest is invited to present to the group. If your group is not the full 7 professionals (Mortgage Originator, Realtor, Financial Advisor, Property & Casualty Agent, Accountant, Real Estate Attorney, Estate Attorney), then guest selection should be used to interview professionals to fill the Core7 positions.

☐ **Reach out to your network for non-core7 professionals and business owners who are interested in presenting to the group.**

- Once filled, non-Core7 professionals are suggested. For example, this could be attorneys specializing in other fields, credit repair companies, electricians, interior decorators, etc. This creates an opportunity to:
  - Build your network
  - Show the value of your Core7 System

MATERIALS FOR MASTERMIND &
1-on-1 PARTNERSHIP PLANNING SESSIONS

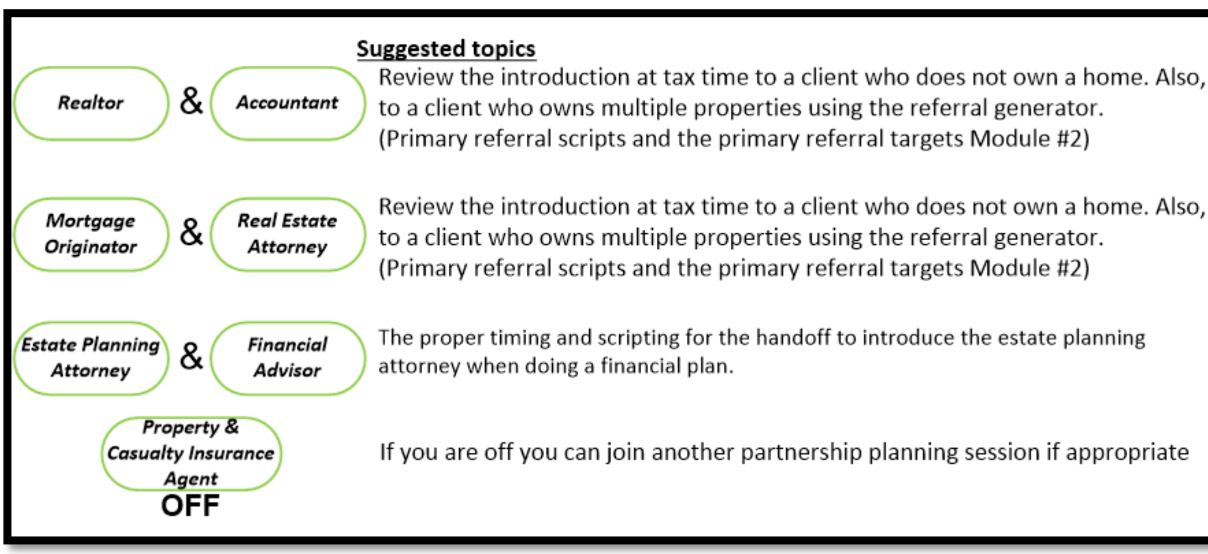
- # HOMEWORK & ONE-ON-ONE PARTNERSHIP PLANNING ASSIGNMENTS

☐ **Review homework for the next meeting**

- Core7 assigns homework to all members that could consist of:
  - Module assignments to prepare for One-On-One sessions (included in the Mastermind Meeting Agendas)
  - Suggested books or articles

☐ **Review the assigned 1on1 Partnership Planning Session**

- In these sessions, two professionals are assigned to meet to discuss a topic more specific to their businesses. For example:



Core7 Referral System

Mastermind Group Agenda

MASTERMIND GROUP ROLES & RESPONSIBILITIES

The group will select two individuals to hold the following roles for each meeting:

1. **Group Leader:** The Group Leader is responsible for guiding and managing the Mastermind Group and its objectives. This role is responsible for keeping the group on topic.

2. **Timer:** The timer is responsible for monitoring the time allotted for each segment and each speaker. This role is also responsible for keeping the group on topic.

THE CORE7 COMMITMENT
(2 minutes)

The CORE7 Commitment requires that each member agree to adhere to the principles below:

1. We will always act in the best interest of the client.

2. We will maintain a safe and supportive environment so the Mastermind Group can communicate openly and candidly.

3. We agree to take leadership with our clients and to follow the Core7 system to the best of our ability and are committed to sending referrals to our Core7 partners.

4. We will diligently introduce our Core7 partners to any other professionals without fear of it negatively impacting our business.

5. We agree to be prepared for each meeting (Completed Lead Tracker and will listen to the assigned module for the Core7 Lesson.)

6. We will be respectful and act with integrity concerning other group members (i.e. do not talk about anyone outside the group meetings).

7. We will not have our cell phones on during the meeting.

I agree to adhere to the principles in the Core7 commitment.

____

(Sign Here)

WHAT'S NEW AND POSITIVE & WHO DO I NEED TO MEET?
(35 minutes/5 minutes for each member)

This is an opportunity to provide ***positive*** **updates, what you need support on, and what professionals and entities you want to be introduced to.** Please use the space below to take notes. (Do NOT discuss referrals in this section. You'll have the opportunity to do so in next section.)

Realtor

Mortgage Originator

Real Estate Attorney / Escrow Officer

P&C Insurance Agent

Financial Advisor

Estate Planning Attorney

Accountant

TRACKING MATRIX
(50 minutes)

CORE7 GROUP REFERRAL TRACKING

TRACKING STEPS FOR REFERRALS

STEP #1: The Core7 group leader asks each professional to list the referrals they have made to their primary targets and other professionals.

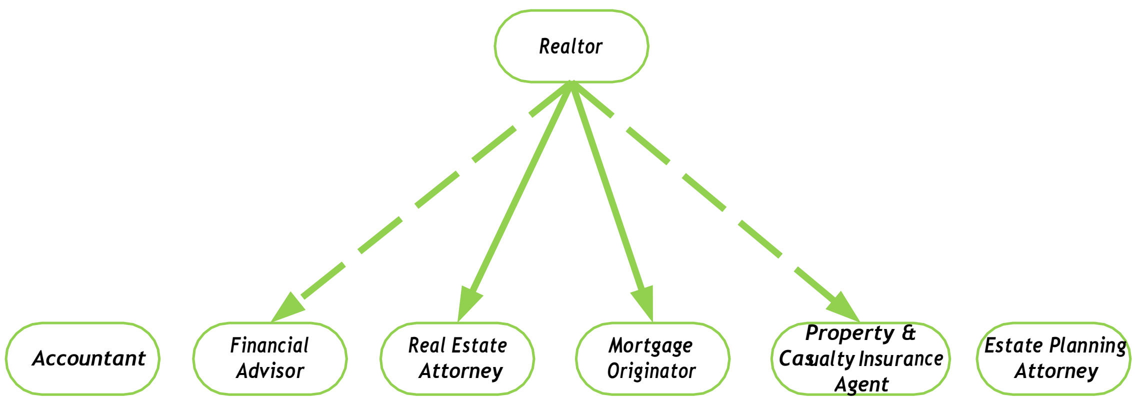
STEP #2: The Core7 group leader asks the professional who received the referral if contact was made.

STEP #3: If contact was made the Core7 group leader should put a checkmark in the appropriate box on the tables that follow.

I. PROFESSIONAL: REALTOR

PRIMARY REFERRAL TARGET #1: MORTGAGE ORIGINATOR	PRIMARY REFERRAL TARGET #2: REAL ESTATE ATTORNEY/ ESCREW AGENT	OTHER:
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐

The Realtor



IF LESS THAN 2 REFERRALS TO EACH OF THE PRIMARY REFERRAL TARGETS, THEN THE GROUP LEADER SHOULD ASK THE QUESTIONS BELOW.

1. How many buyers and sellers are you actively working with who have not purchased or sold a home?

2. Were you successful in cross selling the Mortgage Originator to these clients?

3. How many buyers or sellers went under agreement or closed in the last month?

4. Were you successful cross selling referrals to the Real Estate Attorney on these transactions?

5. Were you able to schedule any Lunch and Learns, or connect with any decision makers?

6. Have you connected, or tried to introduce, any of your core 7 partners to any of the people who they asked to be introduced to in the "What's new and positive and who do I need to meet" section?

II. PROFESSIONAL: MORTGAGE ORIGINATOR

PRIMARY REFERRAL TARGET #1: FINANCIAL ADVISOR	PRIMARY REFERRAL TARGET #2: P&C INSURANCE AGENT	OTHER:
☐	☐	☐
☐	☐	☐
☐	☐	☐
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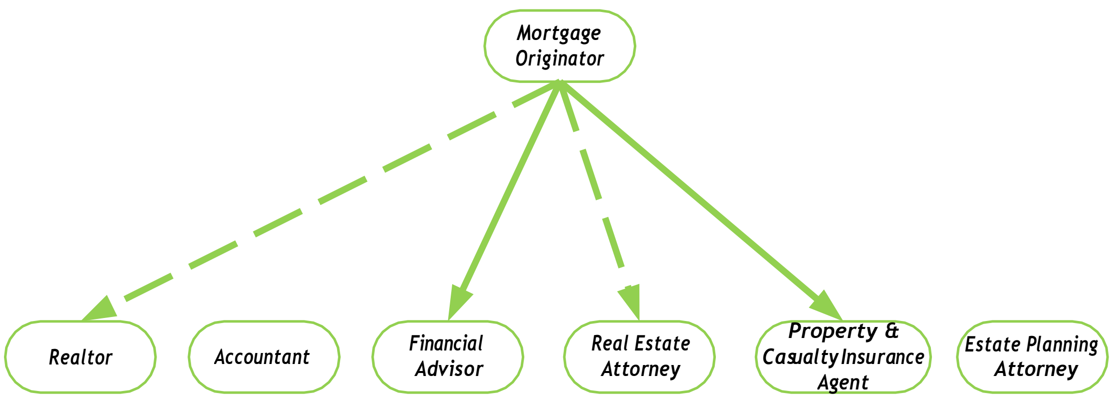
☐	☐	☐
☐	☐	☐

The Mortgage Originator



IF LESS THAN 2 REFERRALS TO EACH OF THE PRIMARY REFERRAL TARGETS, THEN THE GROUP LEADER SHOULD ASK THE QUESTIONS BELOW.

1. How many clients did you pre-approve in the last month?

2. At the loan consultation, were you successful with the referral opportunities to the Financial Advisor specifically, the Cash Flow Cross Sell?

3. How many closings did you have this month?

4. What was the success of the P&C Insurance Cross Sell E-mail this month?

5. Was the Closing Cross Sell for refinances and purchase loans successful this month?

6. How many Mortgage Reviews did you do this past month, and was the Referral Generator successful?

7. Were you able to schedule any Lunch and Learns, or connect with any decision makers?

8. Have you connected, or tried to introduce, any of your core 7 partners to any of the people who they asked to be introduced to in the "What's new and positive and who do I need to meet" section?

III. PROFESSIONAL: REAL ESTATE ATTORNEY/ESCROW AGENT

PRIMARY REFERRAL TARGET #1: FINANCIAL ADVISOR	PRIMARY REFERRAL TARGET #2: P&C INSURANCE AGENT	OTHER:
☐	☐	☐
☐	☐	☐
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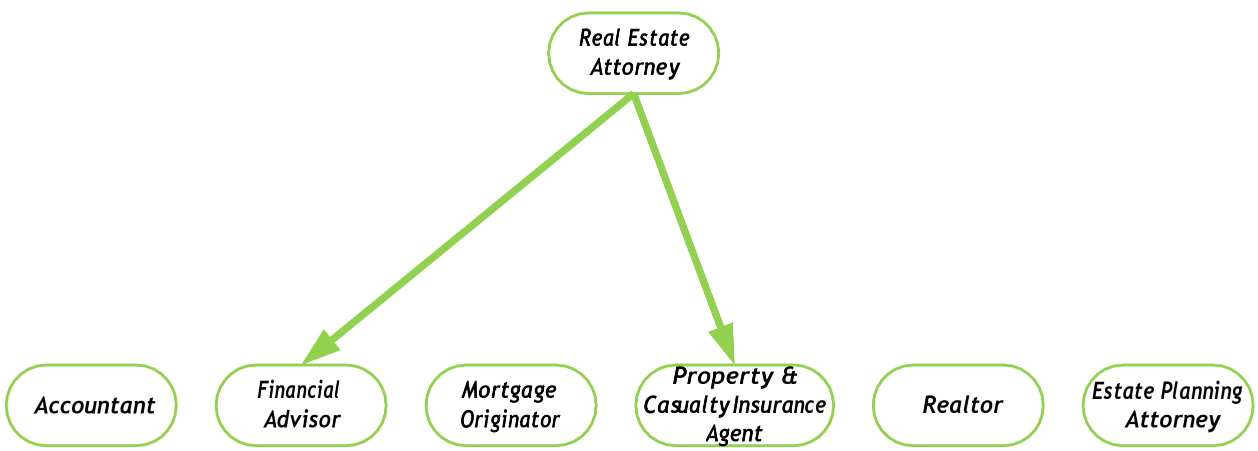
☐	☐	☐
☐	☐	☐
☐	☐	☐

The Real Estate Attorney



IF LESS THAN 2 REFERRALS TO EACH OF THE PRIMARY REFERRAL TARGETS, THEN THE GROUP LEADER SHOULD ASK THE QUESTIONS BELOW.

1. How many closings did you do this month?

2. For those closings, were you successful with the Financial Advisor Closing Cross Sell?

3. How many Purchase and Sale contracts did you do this month and were you successful with P&C Insurance Agent Cross Sell?

4. Did you give any other referrals?

5. Were you able to schedule any Lunch and Learns, or connect with any decision makers?

6. Have you connected, or tried to introduce, any of your core 7 partners to any of the people who they asked to be introduced to in the "What's new and positive and who do I need to meet" section?

IV. PROFESSIONAL: FINANCIAL ADVISOR

PRIMARY REFERRAL TARGET #1: REALTOR	PRIMARY REFERRAL TARGET #2: ESTATE PLANNING ATTORNEY	OTHER:
☐	☐	☐
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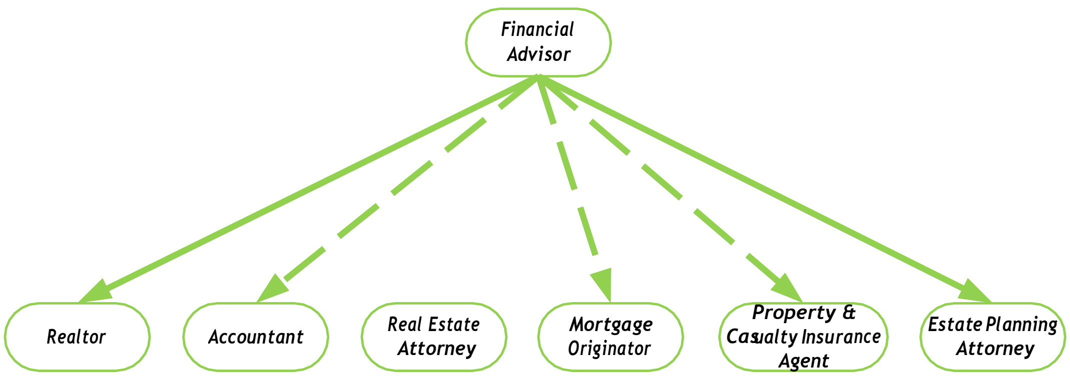
☐	☐	☐

The Financial Advisor



IF LESS THAN 2 REFERRALS TO EACH OF THE PRIMARY REFERRAL TARGETS, THEN THE GROUP LEADER SHOULD ASK THE QUESTIONS BELOW.

1. How many new and existing clients did you speak with in the past month?

2. Were you successful asking the Referral Generator Cross Sell to refer the Estate Planning Attorney?

3. When discussing net worth, were you successful with the Equity Assessment Cross Sell of the Real Estate Agent?

4. How many active client reviews did you do, and were they all introduced to the Estate Planning Attorney?

5. What other Secondary Target Referrals did you make specifically to the Accountant, the Mortgage Originator, and the Property and Casualty Insurance Agent?

6. Were you able to schedule any Lunch and Learns, or connect with any decision makers?

7. Have you connected, or tried to introduce, any of your core 7 partners to any of the people who they asked to be introduced to in the "What's new and positive and who do I need to meet" section?

V. PROFESSIONAL: ESTATE PLANNING ATTORNEY

PRIMARY REFERRAL TARGET #1: REALTOR	PRIMARY REFERRAL TARGET #2: FINANCIAL ADVISOR	OTHER:
☐	☐	☐
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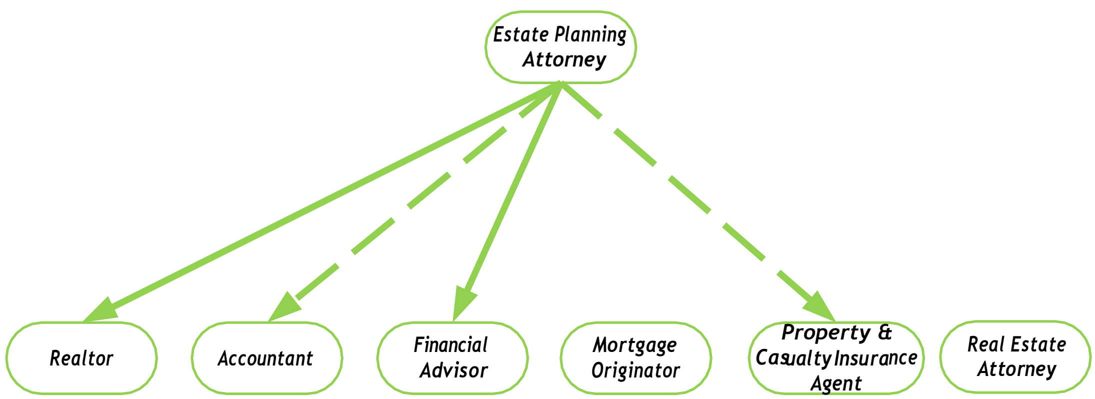
The Estate Planning Attorney



IF LESS THAN 2 REFERRALS TO EACH OF THE PRIMARY REFERRAL TARGETS, THEN THE GROUP LEADER SHOULD ASK THE QUESTIONS BELOW.

1. How many clients have you discussed Estate Planning with this month?

2. When discussing net worth, were you were you successful asking the Referral Generator Question to introduce the Financial Advisor?

3. When discussing net worth, were you successful asking the Referral Generator Question to introduce the Real Estate agent for an Equity Assessment?

4. Were you able to schedule any Lunch and Learns, or connect with any decision makers?

5. Have you connected, or tried to introduce, any of your core 7 partners to any of the people who they asked to be introduced to in the "What's new and positive and who do I need to meet" section?

VI. PROFESSIONAL: P&C INSURANCE AGENT

PRIMARY REFERRAL TARGET #1: FINANCIAL ADVISOR	PRIMARY REFERRAL TARGET #2: REALTOR	OTHER:
☐	☐	☐
☐	☐	☐
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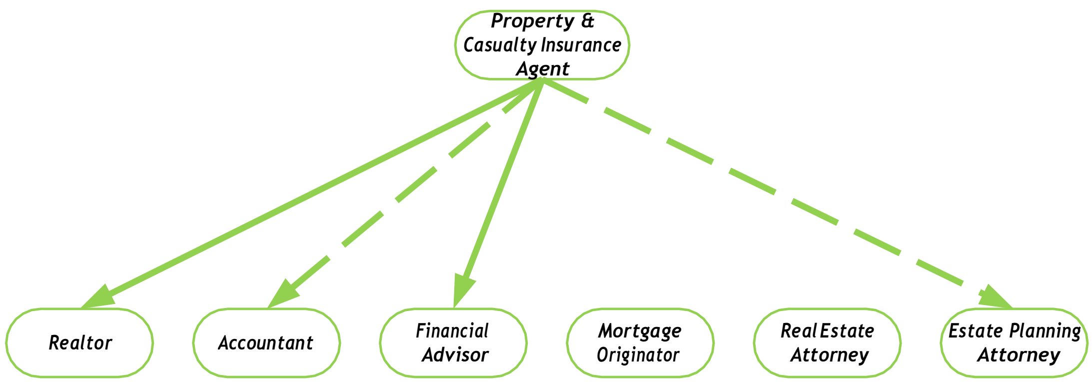
The Property & Casualty Insurance Agent



IF LESS THAN 2 REFERRALS TO EACH OF THE PRIMARY REFERRAL TARGETS, THEN THE GROUP LEADER SHOULD ASK THE QUESTIONS BELOW.

1. How many clients have you discussed an Umbrella Policy with this month?

2. How many clients have you discussed "a full review of all insurance" with this month?

3. Were you successful referring the Financial Advisor in the discussions?

4. How many clients did you discuss Asset Protection and a Net Worth Review with this month?

5. Were you in successful cross selling your Realtor Partner for the Equity Assessment while reviewing net worth?

6. Were you able to schedule any Lunch and Learns, or connect with any decision makers?

7. Have you connected, or tried to introduce, any of your core 7 partners to any of the people who they asked to be introduced to in the "What's new and positive and who do I need to meet" section?

VII. PROFESSIONAL: ACCOUNTANT

PRIMARY REFERRAL TARGET #1: FINANCIAL ADVISOR	PRIMARY REFERRAL TARGET #2: REALTOR	OTHER:
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐
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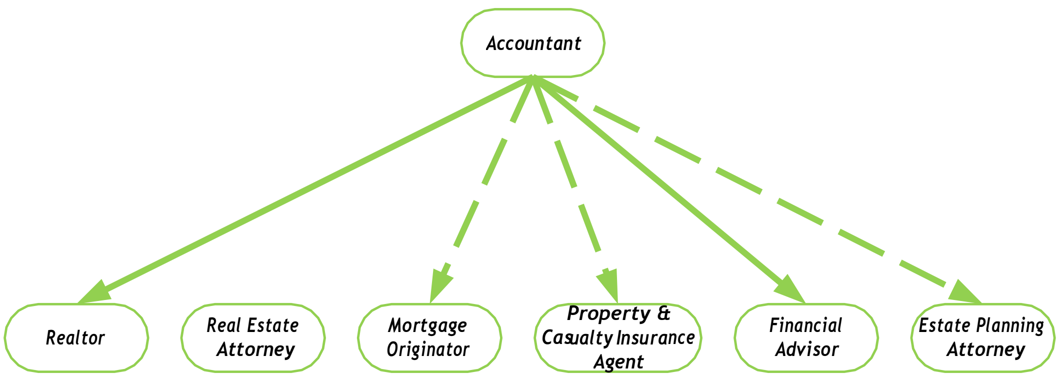
The Accountant



IF LESS THAN 2 REFERRALS TO EACH OF THE PRIMARY REFERRAL TARGETS, THEN THE GROUP LEADER SHOULD ASK THE QUESTIONS BELOW.

1. How many clients did you speak with in the last month?

2. Were you successful with the Referral Generator Question referring the Financial Advisor?

3. When discussing value and calculating net worth, were you in successful cross selling the Realtor for an Equity Assessment?

4. (If it is tax time) How many tax returns have you done, and have you been successful cross selling your partners by email and when speaking with clients?

5. What other Secondary Target Referrals did you make specifically to the Estate Planning Attorney, Property and Casualty Insurance Agent, and the Mortgage Originator?

6. Were you able to schedule any Lunch and Learns, or connect with any decision makers?

7. Have you connected, or tried to introduce, any of your core 7 partners to any of the people who they asked to be introduced to in the "What's new and positive and who do I need to meet" section?

THE HOT SEAT

(15 minutes)

WE SUGGEST STARTING THESE AT THE SECOND OR THIRD MEETING. TIME IN THE BEGINNING SHOULD BE SPENT ON LEARNING THE SYSTEM.

Individual selected: ______________________________

1. What am I doing that you would like me to stop doing?
2. What am I doing that you would like me to do more of?
3. How can I improve?

Notes:

CORE7 LESSON
(20 minutes)

MASTERMIND

Instructor: Group Leader

Lesson/Assignment:

- Discuss doing a lunch and learn for a local business or for your mutual clients.

Module (if necessary):

- Mortgage Module #10, Loan is approved, (0:30-5:00)
- Mortgage Module #11, Mid-Process Survey
- Financial Professional Module #12, Core7 Relationship Builder

Applicable Reading (if necessary/optional):

- Review the *What'$ Your Rate* Package, (Corporate Benefit Section)

Notes:

PROFESSIONAL GUEST

(30 minutes)

WE SUGGEST STARTING THESE AT THE SECOND OR THIRD MEETING. TIME IN THE BEGINNING SHOULD BE SPENT ON LEARNING THE SYSTEM. *(IF YOU DON'T HAVE A FULL GROUP, THIS SECTION SHOULD BE DEDICATED TO INTERVIEWING PROFESSIONALS FOR ANY AVAILABLE CORE7 SPOTS.)*

Guest Speaker: ______________________________

Name: ______________________________

Title: ______________________________

Business: ______________________________

Contact Information: ______________________________

____

____

Suggested Questions for your guest:

- Tell us about your marketing plan for business growth?
- How do you like to be referred? (Specific scripting etc.)
- What do you feel are your best opportunities to generate outgoing referrals?

Notes:

____

____

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____

____

____

HOMEWORK:
1 ON 1 PARTNERSHIP PLANNING SESSION ASSIGNMENTS
(15 minutes)

1. Schedule the next Mastermind Group Meeting
2. Who is on the hot seat?
3. Professional Guest to speak at next meeting?

1-on-1 Assignment - #1

Please refer to the Partnership Planning Session Worksheet.

Other Topics (*if necessary*)

Realtor & *Real Estate Attorney* — Suggested topic discuss communication at purchase and sale and the benefit of the closing cross sell. You must understand that the Mortgage Originator is cross selling also.

Mortgage Originator & *Property & Casualty Insurance Agent* — Discuss the importance of the Realtor cross sells.

Estate Planning Attorney & *Accountant* — Review the Realtor and Financial Advisor introductions.

Financial Advisor
OFF — If you are off, you can join another partnership planning session if appropriate

1-on-1 Assignment - #2

Please refer to the Partnership Planning Session Worksheet.

Other Topics (*if necessary*)

Mortgage Originator & *Estate Planning Attorney* — Discuss the benefits of introducing the Real Estate agent and the Financial Advisor.

Financial Advisor & *Property & Casualty Insurance Agent* — Discuss cross-sell opportunities at insurance renewal, and when discussing umbrella protection, and business owner joint marketing.

Accountant & *Real Estate Attorney* — Discuss systems and real estate value added ideas.

Realtor
OFF — If you are off, you can join another partnership planning session if appropriate

Core7 Referral System

QUARTERLY SCORECARD

HOW TO USE THIS FORM:

Record the dollar amount that you earned under each professional for referrals that closed.

Core7 Quarterly Closing Score Card

How Many Referrals Have You Received that have Closed?

(____/____/____) to (_____/____/____)

Professional	**Referrals that Closed**					
Mortgage Originator	Financial Advisor	P&C Ins. Agent	Estate Attorney	Accountant	R.E. Atty/Escrow Off.	Realtor
Total:						
Financial Advisor	Estate Attorney	Realtor	Accountant	R.E. Atty/Escrow Off.	Mortgage Orig.	P&C Ins. Agent
Total:						
Accountant	Financial Advisor	Realtor	P&C Ins. Agent	R.E. Atty/Escrow Off.	Mortgage Orig.	Estate Attorney
Total:						
Estate Planning Atty	Financial Advisor	Realtor	P&C Ins. Agent	R.E. Atty/Escrow Off.	Mortgage Orig.	Accountant
Total:						
P&C Insurance Agent	Realtor	Financial Advisor	R.E. Atty/Escrow Off.	Mortgage Orig.	Accountant	Estate Attorney
Total:						
Realtor	Mortgage Orig.	R.E. Atty/Escrow Off.	Financial Advisor	Accountant	Estate Attorney	P&C Ins. Agent
Total:						
R.E. Atty/Escrow Off.	Financial Advisor	P&C Ins. Agent	Accountant	Estate Attorney	Realtor	Mortgage Orig.
Total:						

Core7 Referral Ratings & Expectations

Based on years of Research, these are normal market expectations for closings by referral for each professional:

Professional			Primary Referral Target
Realtor			Mortgage Orig.
Poor	Fair	Good	Excellent
0-1	2-3	4-6	7+
			R.E. Attorney/Escrow Off.
Poor	Fair	Good	Excellent
0-1	2-3	4-6	7+

Professional			Primary Referral Target
Mortgage Originator			Financial Advisor
Poor	Fair	Good	Excellent
0-1	2-3	4-5	6+
			P&C Ins. Agent
Poor	Fair	Good	Excellent
0-2	3-5	6-7	7+

Professional			Primary Referral Target
R.E. Atty/Escrow Off.			P&C Ins. Agent
Poor	Fair	Good	Excellent
0-10	11-15	16-20	21+
			Financial Advisor
Poor	Fair	Good	Excellent
0-1	2-3	4-5	5+

Professional			Primary Referral Target
Financial Advisor			Realtor
Poor	Fair	Good	Excellent
0	1	2	3+
			Estate Planning Atty
Poor	Fair	Good	Excellent
0-3	4-8	9-15	16+

Professional			Primary Referral Target
Accountant			Realtor
Poor	Fair	Good	Excellent
0	1	2	3+
			Financial Advisor
Poor	Fair	Good	Excellent
0	1-2	3-5	6+

Professional			Primary Referral Target
Estate Planning Attorney			Realtor
Poor	Fair	Good	Excellent
0	1	2	3+
			Financial Advisor
Poor	Fair	Good	Excellent
0	1-2	3-5	6+

Professional			Primary Referral Target
P&C Insurance Agent			Realtor
Poor	Fair	Good	Excellent
0	1	2	3+
			Financial Advisor
Poor	Fair	Good	Excellent
0-1	2	3	4+

QUESTIONS FOR THE MASTERMIND MEETING IF YOU ARE IN THE “POOR” RANGE

I. Are you executing the system?

Core7 Suggestion:

A. Try referring by email. BCC The partner you are trying to refer.

B. Forward the Client Responses to your partner.

II. Are you not executing the system because you are concerned about your partner?

Core7 Suggestion: Be open and discuss the issues openly with the group. This is how everyone can help to create improvement.

III. What are the objections you are receiving and how are you handling them?

Core7 Suggestion:

A. Discuss with the group.

B. Email C7. Often times there’s a module that addresses the objection.

CORE7’S SELF-PROBATION POLICY FOR POOR STATUS

(If you have been a Core7 member for six months)

I. Do you feel that you are adding value to the group?

II. Have you listened to all the training modules? Could you learn the System better?

III. Do you feel like you should still be in the group?

C7 Suggestion: Have an open discussion with your group members about your participation and adjustments that are needed.

Core7 One-On-One

CORE7 1-ON-1 PARTNERSHIP PLANNING SESSION WORKSHEET

Suggested Questions:

1. What do you think you would need to double your business?

2. What do you think would produce higher quality referrals?

3. What is your goal this week/month/year?

4. Who would you like to be connected with?

5. What are your current challenges or struggles?

6. What can I specifically help you with?

Lead Tracker

Realtor

Mo.	Name	New	Existing	Source	Result of Cross Sell:			Notes
					R.E. Atty.	M.O.	Other	

Questions to Assist You With The Lead Tracker

Realtor

1. How many buyers and sellers are you actively working with who have not purchased or sold a home?
2. Were you successful cross selling the Mortgage Originator to these clients?
3. How many referrals went under agreement or closed in the last month?
4. Were you successful cross selling referrals to the Real Estate Attorney on these transactions?
5. What was the conversion rate of the referrals to the Mortgage Originator and the Real Estate Attorney on these transactions?
6. What other Secondary Target Referrals did you make specifically to the Financial Advisor or Property and Casualty Insurance Agent?
7. Were you able to schedule any Lunch and Learns, or connect with any decision makers?

Lead Tracker

Mortgage Originator

Mo.	Name	New	Existing	Source	Result of Cross Sell: F.A.	P&C	Other	Notes

Questions to Assist You With The Lead Tracker

Mortgage Originator

1. How many clients did you pre-approve in the last month?

2. At the loan consultation, were you successful with the referral opportunities to the Financial Advisor specifically, the Cash Flow Cross Sell?

3. How many closings did you have this month?

4. What was the success of the P&C Insurance Cross Sell E-mail this month?

5. Was the Closing Cross Sell for refinances and purchase loans successful this month?

6. How many Mortgage Reviews did you do this past month, and was the Referral Generator successful?

7. What other Secondary Target Referrals did you make specifically to the Real Estate Agent and the Real Estate Attorney?

8. Were you able to schedule any Lunch and Learns, or connect with any decision makers?

Lead Tracker

Real Estate Attorney

Mo.	Name	New	Existing	Source	Result of Cross Sell:			Notes
					F.A.	P&C	Other	

Questions to Assist You With The Lead Tracker

Real Estate Attorney

1. How many closings did you do this month?

2. For those closings, were you successful with the Financial Advisor Closing Cross Sell?

3. How many Purchase and Sale contracts did you do this month and were you successful with P&C Insurance Agent Cross Sell?

4. Did you give any other referrals?

5. Were you able to schedule any Lunch and Learns, or connect with any decision makers?

Lead Tracker

Property & Casualty Insurance Agent

Mo.	Name	New	Existing	Source	Result of Cross Sell:			Notes
					F.A.	Real.	Other	

Questions to Assist You With The Lead Tracker

Property & Casualty Insurance Agent

1. How many clients have you discussed an Umbrella Policy with this month?
2. How many clients have you discussed "a full review of all insurance” with this month?
3. Were you successful referring the Financial Advisor in the discussions?
4. How many clients did you discuss Asset Protection and a Net Worth Review with this month?
5. Were you successful cross selling your Realtor Partner for the Equity Assessment while reviewing net worth?
6. What other Secondary Target Referrals did you make specifically to the Accountant and the Estate Planning Attorney?
7. Were you able to schedule any Lunch and Learns, or connect with any decision makers?

Lead Tracker

Financial Advisor

Mo.	Name	New	Existing	Source	Result of Cross Sell: E.P. Atty.	Real.	Other	Notes

Questions to Assist You With The Lead Tracker

Financial Advisor

1. How many new and existing clients did you speak with in the past month?

2. Were you successful asking the Referral Generator Cross Sell to refer the Estate Planning Attorney?

3. When discussing net worth, were you successful with the Equity Assessment Cross Sell of the Real Estate Agent?

4. How many active client reviews did you do, and were they all introduced to the Estate Planning Attorney?

5. What other Secondary Target Referrals did you make specifically to the Accountant, the Mortgage Originator, and the Property and Casualty Insurance Agent?

6. Were you able to schedule any Lunch and Learns, or connect with any decision makers?

Lead Tracker

Estate Planning Attorney

Mo.	Name	New	Existing	Source	Result of Cross Sell: F.A.	Real.	Other	Notes

Questions to Assist You With The Lead Tracker

Estate Planning Attorney

1. How many clients have you discussed Estate Planning with this month?

2. When discussing net worth, were you were you successful asking the Referral Generator Question to introduce the Financial Advisor?

3. When discussing net worth, were you successful asking the Referral Generator Question to introduce the Real Estate agent for an Equity Assessment?

4. What other Secondary Target Referrals did you make specifically to the Accountant, the Mortgage Originator, and the Property and Casualty Insurance Agent?

5. Were you able to schedule any Lunch and Learns, or connect with any decision makers?

Lead Tracker

Accountant

Mo.	Name	New	Existing	Source	Result of Cross Sell:			Notes
					F.A.	Real.	Other	

Questions to Assist You With The Lead Tracker

Accountant

1. How many clients did you speak with in the last month?

2. Were you successful with the Referral Generator Question referring the Financial Advisor?

3. When discussing value and calculating net worth, were you successful cross selling the Realtor for an Equity Assessment?

4. (If it is tax time) How many tax returns have you done and have you been successful cross selling your partners by email and when speaking with clients?

5. What other Secondary Target Referrals did you make specifically to the Estate Planning Attorney, Property and Casualty Insurance Agent, and the Mortgage Originator?

6. Were you able to schedule any Lunch and Learns, or connect with any decision makers?