



JCM LOAN OFFICER

BUSINESS CARD > RELATIONSHIP > REFERRAL CHECKLIST

Agent / Contact: _____ Company: _____ Date Met: _____
Event: _____ Phone: _____ Email: _____

1. CAPTURE THE CONTACT – SAME DAY

- ☐ Enter the contact into the CRM
- ☐ Confirm name, company, phone number & email are complete
- ☐ Add the appropriate CRM tags
- ☐ Record where and when we met
- ☐ Add notes from our conversation
- ☐ Record their market / area of business
- ☐ Record any goals, challenges or pain points discussed
- ☐ Enter the next action I plan to take
- ☐ Make sure contact type is Agent for weekly communication

Key notes from our conversation:

RULE: No business card stays in your pocket, car, desk or phone without being entered into the CRM.

2. CONNECT SOCIALLY – WITHIN 24 HOURS

- ☐ Find and connect/follow them on their primary social media platform(s)
- ☐ Review their profile to learn more about their business
- ☐ Engage naturally with a recent business-related post when appropriate
- ☐ Invite/connect them to the Johns Creek Mortgage social media pages
- ☐ Make sure my own social profile represents me and JCM professionally

Social platforms connected: ☐ Facebook ☐ Instagram ☐ LinkedIn

☐ Other: _____

GOAL: Stay visible without immediately asking for business.

3. ASK FOR THE ONE-ON-ONE – WITHIN 24-48 HOURS

- ☐ Personally reach out and ask to meet
- ☐ Suggest a specific meeting instead of saying, "We should get together sometime."
- ☐ Offer coffee, breakfast, lunch, brunch, happy hour or another appropriate meeting
- ☐ Put the meeting on the calendar once accepted

Date I asked: _____

Meeting date: _____

Meeting type/location: _____

GOAL: Move the relationship from "Nice meeting you" to "Let's learn how we can help each other."

4. HAVE THE RELATIONSHIP MEETING

- ☐ During the meeting, learn about their business before talking about yours
 - ☐ Ask about their business and current market
 - ☐ Ask about their goals
 - ☐ Ask about their biggest challenges
 - ☐ Ask about their typical clients
 - ☐ Ask what they expect from a great lending partner
 - ☐ Identify ways I/JCM can make their job easier
 - ☐ Identify at least one specific way I can provide value
 - ☐ Update my CRM notes after the meeting
 - ☐ Establish the next action or reason to reconnect
- How can I/JCM help? ☐ Open houses ☐ Marketing / co-marketing
☐ Industry / market data ☐ Client education
☐ Financing scenarios / preapprovals
☐ Co-sponsored opportunities ☐ Other: _____

5. SEND THE THANK-YOU – SAME DAY / NEXT MORNING

- ☐ Send a personal thank-you note/message
- ☐ Reference something specific from our conversation
- ☐ Mention the value or assistance I offered
- ☐ Make the message personal – not generic
- ☐ Include a clear next step when appropriate

Thank-you sent: _____
REMEMBER: The thank-you isn't a formality. It proves you listened.

Next commitment made: _____

6. CREATE THE NEXT TOUCH – BEFORE THE RELATIONSHIP GOES COLD

- ☐ Schedule the next follow-up in the CRM
- ☐ Determine what value I can provide at the next touch
- ☐ Schedule another one-on-one when appropriate
- ☐ Continue engaging with their business on social media
- ☐ Keep them connected to JCM updates and momentum
- ☐ Maintain meaningful contact at least quarterly

Next touch date: _____

Next value-add: _____

Quarterly relationship rhythm:

- Q1 - Coffee / relationship check-in
- Q2 - Market or mortgage update
- Q3 - Co-marketing / business-building idea
- Q4 - Business planning / goals for next year

THE CARD IS NOT THE GOAL. THE RELATIONSHIP IS.

Before you consider this contact successfully worked:

- ☐ **CRM** — Contact entered with useful notes
- ☐ **VALUE** — Identified how I can help their business
- ☐ **SOCIAL** — Connected and engaged
- ☐ **THANK YOU** — Personal follow-up sent
- ☐ **MEETING** — One-on-one requested/booked
- ☐ **NEXT TOUCH** — Future follow-up scheduled

No contact should ever be sitting in your CRM without a next action.

SHOW UP → FOLLOW UP → STAY VISIBLE → ADD VALUE → EARN TRUST → EARN REFERRALS

