Johns Creek MORTGAGE

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The Successful Loan Officer: Daily Schedule

A practical 8-hour workday focused on new relationships, pipeline conversion and consistent follow-through.

Daily time-block schedule

TIME	FOCUS	EXPECTED ACTION
9:00 - 10:00 AM	**REALTOR prospecting**	Call/text agents to schedule coffee, lunch, happy hours and office visits for next week.
10:00 AM - 12:00 PM	**Pipeline & prospects**	Review active loans, preapprovals, warm leads, stalled prospects and follow-up commitments.
12:00 - 2:00 PM	**In-person REALTOR meetings**	Coffee, lunch, brokerage visits and one-on-one relationship building.
2:00 - 3:00 PM	**Social media**	Post helpful content; comment on agent listings and closings; engage authentically.
3:00 - 3:30 PM	**Handwritten notes**	Write and mail personal thank-you notes to agents, clients and referral partners.
3:30 - 4:00 PM	**Database outreach**	Connect with past clients, dormant preapprovals and sphere-of-influence contacts.
4:00 - 4:30 PM	**Market/product education**	Study mortgage guidelines, programs and solutions for challenging loans.
4:30 - 5:00 PM	**CRM & next-day plan**	Log activities, confirm meetings, set follow-ups and prioritize tomorrow.

Scheduling note: The noon block assumes a working lunch with a REALTOR. Personal lunch breaks require adjusted hours. Urgent borrower and closing needs may require moving - not abandoning - prospecting blocks.

Daily activity accountability scorecard

ACTIVITY	TARGET	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
REALTOR calls/texts	20-30	[ ]	[ ]	[ ]	[ ]	[ ]
REALTOR appointments scheduled	2-3	[ ]	[ ]	[ ]	[ ]	[ ]
In-person REALTOR meetings	1-2	[ ]	[ ]	[ ]	[ ]	[ ]
Pipeline/prospect follow-ups	10-15	[ ]	[ ]	[ ]	[ ]	[ ]
Social media engagements	10-15	[ ]	[ ]	[ ]	[ ]	[ ]
Handwritten notes mailed	3-5	[ ]	[ ]	[ ]	[ ]	[ ]
Past client/database contacts	5	[ ]	[ ]	[ ]	[ ]	[ ]
Product education	30 minutes	[ ]	[ ]	[ ]	[ ]	[ ]
CRM updated / tomorrow planned	Yes	[ ]	[ ]	[ ]	[ ]	[ ]

Targets are proposed starting benchmarks. Track quality and conversion, not just volume.

Four standards for success

Protect the prospecting hour. Prioritize proactive outreach over routine inbox management, except for urgent borrower or closing needs.

Book next week before it begins. By Friday, fill next week's appointment calendar. Unbooked meeting time becomes in-person office outreach.

Measure results, not busyness. Review conversations, appointments held, referrals, applications, preapprovals and closings.

Be flexible, but accountable. When urgent transactions displace a block, reschedule the revenue-generating activity.

90-day rollout

Days 1-30: Build consistent habits. Days 31-60: Measure new meetings and opportunities. Days 61-90: Evaluate applications, contracts and funded production.

Core principle: Successful loan officers work today's loans while deliberately creating the loans they will close 30, 60 and 90 days from now.