

Loan Partner - Marketing

TOP 3 DUTIES

- 1. Deliver WOW Customer Service**
- 2. Calendar/Team Lead Organization**
- 3. Data Base/Social Media/Event Management**

1. WOW Customer Service

- Welcome board for all clients/snack area full and available for clients
- Ensure delivery of Client Gifts Through Process per checklist
- Ensure gift supply is full at all times
- Keep TL's desk spotless
- Keep TL on track with calls and schedule

2. Calendar/Team Lead Organization

- Set all appointments for team lead
- Confirm all appointments the day before and if you leave message call the day of
- Answer the phone 90% of the time
- Have at least two call back times scheduled in team leaders day and change voicemail to reflect those times
- Team Lead Homework
- Calendar Management – color coating/arranging/fill

3. Data Base/Social Media/Event Management

- Facebook, Twitter, LinkedIn etc. to be posted daily/weekly as necessary
- Ensure we stay on top with search engines
- Prepare weekly videos each month with LO to go out on Monday's
- Update Mortgage Returns Weekly
 - o Loans Closed
 - o New Referral Partners
 - Labeling (a,b,c etc.)
- Birthday program – weekly cards to team lead
- Ensure Post Card goes out each month to data base
- Attend weekly marketing meetings
- Drip campaign monthly to all counseled/TBD clients
- Event Flier and email preparation
- Fill event through calling potential attendee's
- Event email once month prior, one week prior and day of event
- Event reservation/materials/setup/meals

