

Example: Loan Officer 30-60-90 Day Plan

New Loan Officers: _____ **Date:** _____

Description – This will outline our expectations for the first 90 days of employment for all Loan Officers. A performance review will be performed after 90 days, based on these goals. (Dates for accomplishments requiring the use of the new laptop computer will be adjusted based upon the delivery date of the computer)

30 Day Goals – To Be Accomplished by (DATE)

- Set up new laptop computer.
- Install and become proficient using Outlook Email.
- Begin using all COMPANY Software.
- Install and begin using ACT! Input “Sphere of Influence” contacts into database.
- Develop “Sphere of Influence” list and send out introduction letters/announcement cards. (Submit list to Sales Manager (SM))
- Become familiar with COMPANY products and programs.
- Become familiar with COMPANY policies and complete all required online training courses including: Privacy, Information Security, Advertising & Marketing, Code of Ethics, Fair Lending Policy, Fraud Awareness, Anti-money Laundering, and Growing Your Business, etc... (Outbound Marketing).
- Attend all weekly sales meetings and scheduled training sessions.
- Obtain a professional “Marketing” photo, and place on web-site.
- Devise personal marketing system and begin writing annual business plan.
- Schedule quality time with top producing COMPANY Loan Officers to review their business strategies and unique selling propositions, and to join them for sales calls and closings whenever possible.
- Introduce yourself to the Team at the Closing Center (if not local).
- Read and understand all compliance, disclosure and loan documentation including application and loan closing documentation.
- Understand work flow and file flow procedures.
- Schedule time with SM to begin training on loan pricing strategy, pricing goals and commission calculations.
- Attend and complete organization Training programs by DATE.
- Build your Loan Officer Marketing Kit.

60 Day Goals – To be accomplished by (DATE)

- Schedule time with Manager to review pricing, and training from first 30 days
- Develop and demonstrate a thorough knowledge of the organization loan pricing strategy, pricing goals and commission calculations.

- Finalize and implement formal “Marketing Plan”. Copy to SM.
- Complete business plan – submit to SM for approval.
- Begin using a weekly sales planner and review each week with SM.
- Practice sales skills and lead source presentations with Manager, joint call as needed/possible with Manager and other organization top producers.
- Begin aggressive calling on Realtors, Builders and Affinity Sources.
- Demonstrate use of ACT! for call tracking and marketing activities.
- Develop a customer service program including use of sales scripts, letters, pre and post-closing follow, etc.
- Begin building pipeline and additional lead sources.
- Register a minimum of 4 new loan requests.
- Review monthly/quarterly reports on pipeline management.
- Develop at least one COMPANY sales presentation for a Realtor or Builder source and practice this presentation at a branch sales meeting.

90 Day Goals – To be Accomplished by (DATE)

- Make a minimum of 15 face-to-face sales calls per week with Realtors, Builders and Affinity sources during this period.
- Register 5 new loan requests and start to close registered loans.
- Review and adjust “Marketing Plan” as needed. Implement changes.
- Demonstrate consistent use of ACT! for contact management, sales planning, customer service, etc.
- Demonstrate that all monthly/quarterly reporting is completed timely and accurately.
- Select and become involved in at least one “industry-related” group or function (i.e. HBACA, Board of Realtors, etc.)
- Demonstrate a thorough understanding of organization and our tools, resources, quality of service standards, and marketing strategies.
- Demonstrate a strong “team spirit” and personal contribution to organization office.

NOTES: _____

Agreed to by: _____ and _____

Loan Officer

Sales Manager

Completed Date: _____

By: _____ and _____

Loan Officer

Sales Manager