



Weekly Team Meeting Agenda

Thursday, February 24, 2011

Sales meeting conference call # (610) 214-0000 - Participant Access Code: 763747#

Prior Week In Review

- Encompass, Point is over...

General Discussion

- New website.... TeamPrimary.com – LO websites are being built
- 1st payment questions from borrowers can be directed to Natalie Newman at ext 1241
- New payroll system
- Facebook with Carolyn

Quality – Improving “Our” Process

- Inquiry and past addresses need to be specific.
- PRMI overlay email – great reference point.
- Exact NMLS name needs to be on your loan application. Please verify.
- Change of circumstance need to be done on ALL changes, even lock extensions, this can delay your closing if not done immediately when changes are made. (process)
- Digitally complete the “loan submission form”
- No checks for appraisal unless absolutely no credit card available
- Template set, see email and use instructions
- Reserves- using retirement accounts for reserves needs term & cond still.
- Print rate sheet when floating – better safe than sorry until 4-1-11

Training

Product of the Week

- FHA Choice Product – A great way to loose a Real Estate Agent.

Resources

- Product scenario hotline. @ <https://myprmi.primeres.com> login, select helpdesk.
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Product Updates

- April 18th – New FHA MI going up .25% totaling 1.15% on most common FHA loans

System Updates

- Encompass is date sensitive – very important! COC
- Encompass import export, any issues?
- Encompass help desk – at home page click “resource center / chat now” (great!)

Sales

Weekly Sales Challenge

- Coming Soon!

Ideas / Tips / Tools

- Referral worksheet
- Asking for business

Team Direction / Goals

- Team Focused - Challenges
- Roadmap to Success
- Our Customers -