Genworth
Mortgage Insurance

Building a Referral Network and Accomplishing Goals

Exercises for Genworth Webinar New Loan Officer Series #03: Building a Referral Network and Accomplishing Goals

Complete the exercises below as they are prompted during the webinar.

Exercise 1

List **20 family members and friends** to whom you could send an announcement about your new position. This could be done over email, phone call, text, LinkedIn message, or others where appropriate.

List **5 attorneys and/or financial planners** to whom you could send an announcement about your new position. Choose an appropriate channel such as a phone call, email, or LinkedIn message.

Exercise 2

Check out your company's social media policy and update your social pages and profiles in accordance with those policies.

- ☐ LinkedIn
- ☐ Twitter
- ☐ Facebook
- ☐ Instagram
- ☐ Others?

Exercise 3

List two community or charity organizations with which you be involved.

List 20 real estate agents that you are considering trying to partner with. If you cannot complete this list, Google real estate agents in your desired zip code to find additional contacts.

Exercise 4

Once you get to know the agents you listed above, plot them on this four-blocker based on how we defined each group.

Low Volume	High Volume	
		Easy to Work With
		Difficult to Work With

*Revisit this chart every 6 months to see if any of your existing agents/referral sources have changed position on the four-blocker or to add new agents/referral sources.