

EDGE™

Empowering experienced Loan Officers with sales and marketing strategies along with tactical solutions for growing purchase production in any market

What will you gain?

EDGE™ is designed and delivered by previous top producers specifically for mortgage professionals. It empowers experienced Loan Officers with the strategies, tools, and motivation needed to achieve immediate results – with a week-by-week improvement in prospecting and production. Each session is packed with proven strategies, to help Loan Officers grow their business.

EDGE™ will empower Loan Officers to see a measurable increase in production through:

- Building a strategic plan to generate a sustainable business
- Increasing market share and loyalty among key referral sources
- Focusing on effective marketing and consistent prospecting activities
- Developing referral sources through a proven and methodical approach

What's included?

EDGE™ launches with a 60-minute Launch Party to get students in the right mindset to execute at a high level and set expectations for the program. Classes focus on building the most critical Loan Officer skills: time management, business development, and effective sales prospecting. The lessons are comprehensive and divided into manageable modules that allow Loan Officers to continue working their business while learning how to grow their production. Each interactive session includes handouts that students will use to follow and complete during training ensuring engagement, comprehension, and retention.

In addition to webinars, EDGE™ includes required weekly assignments that are reviewed by seasoned XINNIX Performance Specialists. This accountability helps Loan Officers stay on the path to growth, ensuring the new habits will become second nature after the sessions are complete.

EDGE™ students also receive over 50 post-class business tools at no additional cost. Combined with training, these tools help Loan Officers generate and sustain a measurable increase in production.

The aviation industry has one of the highest success rates because pilots train with precision, process, and mastery. At XINNIX, we model that same approach, equipping sales professionals and leaders with the knowledge, skills, and disciplines needed to perform at the highest level.

Intended Audience

- Loan Officers
- Loan Officer Assistants (with sales and marketing responsibilities)
- Producing Managers
- Branch Managers
- Sales Managers

How does it work?

- Begins with 60-minute Launch Party
- Weekly Classes:
 - Class 1: 90-minutes
 - Classes 2 – 8: 60-minutes
- Classes held at the same time weekly
- Accountability: Weekly assignments reviewed by XINNIX instructors
- Resources: Comprehensive Handouts provided with each training session
- Post-class Tools: Access to 50 business tools after completing the course
- Start Dates: New series begin monthly
- Group Rates: Available upon request



Program Agenda

A Loan Officer will walk away with the Four Pillars of Success in sales. Each pillar is critical to the process of building a purchase business of key referral sources. Students will also receive a business plan that provides the methodology of time management and outlines key activities that will ensure predictable success long term.

Through these eight power-packed classes, Loan Officers will develop skills in areas such as:

Class 1 – Marketing Effectively

- Be evaluated against the six attributes of the most successful LOs to effectively prioritize opportunities to grow a pipeline
- Identify specific Key Targets™ to create a predictable referral source business
- Learn how to profile Key Targets™ and create marketing strategies that grab attention
- Understand how to effectively obtain an appointment with a Key Target™ to increase production

Class 2 – Building Relationships

- Receive a proven process for conducting quality one-on-one appointments with Key Targets™
- Identify a unique selling proposition to increase referrals
- Receive a customizable one-on-one presentation to effectively showcase a value proposition
- Be equipped to overcome the most common Key Target™ objections with confidence

Class 3 – Following Through

- Gain essential tools to execute daily priorities effectively
- Learn a process to exceed commitments and build a respected reputation
- Obtain various sources for creating value-added marketing pieces to maximize name recognition
- Gain the insight and mindset needed to achieve excellence in business

Class 4 – Delivering Value

- Build a team committed to providing great service to Key Targets™
- Gain a structured process for productive processor meetings
- Be able to leverage every closing with highly effective marketing strategies for more business
- Learn a post-closing strategy that will effectively grow repeat business from customers and Key Targets™

EDGE™ includes post-class tools such as:

- Comprehensive business plan sample and template
- Key Target™ profile worksheets
- Unique value proposition sample and template
- One-on-one presentation script and template
- Referral request script
- Database call sheet
- Weekly Flight Plan™ sample and template
- Call reluctance action plan
- ... and more



Program Agenda Continued

Class 5 – Efficiency in Time Management

- Create a blueprint for success through writing and implementing a Navigation Plan™
- Leverage a planning process that maximizes prospecting time
- Measure marketing activity with Key Targets™ to ensure success in owning a marketplace

Class 6 – Overview of Call Reluctance

- Discover the number one secret to success in sales based on over 30 years of research
- Learn what sales call reluctance is and how much it costs a salesperson monthly
- Discover the key traits of natural self-promoters and the three essential techniques they use to lead in their field

Class 7 – Overcoming Call Reluctance

- Identify specific types of sales call reluctance and their financial impact on production
- Learn mortgage specific strategies and tactics to address the 12 types of sales call reluctance
- Create a personal implementation plan to overcome sales call reluctance long-term

Class 8 – Art of Implementation

- Evaluate prospecting activity to predict future production
- Determine the top three action items that will impact success
- Implement a daily, morning, and evening routine to save time

WHAT PEOPLE ARE SAYING

"If you are tired of watching your production fluctuate, EDGE™ is for you."

– C. Hampton
Loan Officer

"It seems the XINNIX philosophies and practices have become second nature to us in our company and our volume shows it every month."

– A. Edwards
Mortgage Loan Officer

"I have participated in many trainings over the years. I can honestly say XINNIX is the best!"

– C. Richard
Mortgage Loan Consultant



**More clients, better referrals, and
a winning marketing campaign—
EDGE makes it happen!**

Talk About ROI

"I completed EDGE about 6 weeks ago, and even after implementing the tools I learned in the first week, I was able to increase my purchase applications week after week. I closed 5 purchases last month and have about 17 in my pipeline. Using the weekly contact tools and all of the processing and post-closing follow-up, I have elevated old relationships and started new ones that catapulted me into a top loan originator within my market. If you follow the program, you will increase your business, and most importantly, you will have a business and not be tied to refinance/internet leads model as a career. Strongly recommend this for committed LOs who are ready to increase their business."

- J. Gaffney

Home Mortgage Consultant

"After instituting the things I learned from XINNIX, I have built quite a business. I concentrate on purchases and try to stay clear of refinances. I closed over 40 loans in a month! In this day and age, for me to be able to say that I am going to make more money this year than ever in my life, all I can say is, GO XINNIX!"

- C. Flaherty

Branch Manager

Proven Training

Learn more at www.XINNIX.com, where you will also find our extensive Resource Library with valuable content, market updates, and key industry information to help you in your business.

Having trained thousands of Loan Officers and leaders, XINNIX deploys a proven methodology that combines energy with excellence - transforming the organization and delivering real, measurable ROI.