What will you gain?

MANAGING FOR PERFORMANCE™ is for managers who are responsible for ensuring the success of their new loan officers during and after they’ve enrolled in the XINNIX New Loan Officer Performance program, ORIGINATOR™.

Managers will understand what their loan officers are learning, how to engage them early and ultimately, how to effectively partner with them, setting them up for a successful and productive career long-term.

MANAGING FOR PERFORMANCE attendees will acquire a proven methodology for:

- Understanding the prospecting activities required within ORIGINATOR and how to prepare their new loan officers for training
- Effectively managing new loan officers according to their Launch Plan
- Providing coaching and accountability needed in their 3-2-1 for Success™
- Utilizing a four-step process to conduct highly effective, impactful and powerful one-on-one meetings
- Managing new loan officers to a successful and productive career

What’s included?

This manager program provides leaders with valuable business tools they can use after the program to ensure their coaching activities are highly effective. The program includes management and guidance tools such as:

- ORIGINATOR™ Manager Guide
- Launch Plan Review template
- 3-2-1 for Success worksheet
- Powerful Coaching Questions
- One-on-One Coaching
- Ride-Along Evaluation

Intended Audience

- Any manager of a new loan officer enrolled in ORIGINATOR™

How does it work?

- One self-paced guide
- One, 90 minute, interactive webinar led by XINNIX Performance Specialists
- Extensive suite of post-class business tools

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Course Agenda

Class 1 – Partnering for Success

This self-paced lesson ensures managers are equipped to provide successful assimilation and support for their new loan officers.

Upon completing this lesson within the program, a manager will:

- Understand the role in supporting new loan officers during their enrollment in the three phases of the ORIGINATOR program: Ground School, Flight School and Officer School
- Fully understand the specific daily, weekly and monthly activities required within each phase and how a manager’s support is crucial to their loan officer’s success
- Be able to prepare their existing team for their new team member and also prepare their new loan officer for training once they are on board
- Fully understand the value of their new loan officer’s XCO (XINNIX Certified ORIGINATOR) designation

Class 2 – Managing for Success

Creating the proper plan, setting the right expectations and designing the strategy to complete it are essential to launching a successful career for a new loan officer. A manager’s guidance will serve as a compass for the direction their business will take in the future. This class provides managers with the foundational principles and the steps needed in order to effectively manage a new loan officer’s immediate and future success.

Upon completing this lesson within the program, a manager will be able to:

- Effectively manage their new loan officer according to their Launch Plan
- Provide coaching and accountability to critical daily, weekly and monthly prospecting disciplines
- Utilize a four-step process to conduct highly effective, impactful and powerful one-on-one meetings
- Manage new loan officers towards a successful and productive career

What people are saying

“Drew completed ORIGINATOR successfully and started his work in earnest as a junior loan officer in about mid August. By Fall, Drew funded $2.5 million. Clearly a career high. Then in May he funded 17 transactions (30% purchase) for a total of $3.7 million in closed loans. He is the top producer for my region for the month. Thank you for having such easy to use, comprehensive resource for organizations like ours!”

– S. Brown SVP Regional Manager

“Aaron has a pipeline of $2mm of locked and submitted loans slated to close in September, which has exceeded my expectations...I attribute that to this program. It was well worth the investment!!”

– D. Ehler Business Manager