



TODD DUNCAN'S
SALES MASTERY
25 YEARS
1992-2017

SALES MASTERY
BREAKTHROUGH
OCTOBER 3-6, 2017

The 2017 Recap

Curated by our friends at



SALES MASTERY
25 YEARS
1992-2017

Celebrating 25 Years

by Todd Duncan

My vision in 1991 was to launch a conference that would help originators, leaders, and industry peers gather together, and learn the art and the science of mastering sales. Thanks to hungry success minded people like you, the Sales Mastery Event has become the most trusted and highest attended event in the history of the mortgage space, helping tens of thousands of people succeed in their business and achieve significance in life.

While the Sales Mastery experience is a critical step, the real impact to your business and life will be the ideas and actions you take to drive the growth and success you desire.

Now is the time to put your plans in place, seek accountability, and experience your breakthrough!

Thank you for making Sales Mastery a success!

Todd Duncan

CEO - High Trust Coaching



LISTEN:



OFFICIAL SALES MASTERY
SOUNDTRACK

Brian was a personal coach, mentor, and friend of everyone at High Trust, Maxwell and the mortgage community. Brian, you are missed beyond words. Brian was a victim of the 2017 Las Vegas massacre, leaving his wife, four children, parents and loved ones in a world of pain and emptiness. Life for so many will never ever be the same.

To support Brian's family:
www.BrianFraserFund.com



Brian Fraser

1978 - 2017





SALES MASTERY
25 YEARS
— 1992-2017 —



Opening Night

Hosted by Justin Flom

What a night it was. We we're blessed to have Justin Flom, the magician extraordinaire, dazzle us with his skills that clearly left the audience in awe. Justin has appeared on Ellen, The Today Show, Rachael Ray, network Late Night Shows, and many more. From reappearing lifesavers to a floating stool, whether you were asked to come on stage that night or not, I think we all had a moment back at the hotel room that night Googling "how to become a magician?"

He also taught us a valuable lesson on a key theme of Sales Mastery 25: **How to find your lane and stay in it.**

breakthrough (breyk·throo) n.

1. an act or instance of removing or surpassing an obstruction or restriction **2.** any significant or sudden advance, development, or achievement





Things To Do For Your Breakthrough

Advice from Todd Duncan



Find your lane

Be the best at what you do best.
Don't let distractions take you off course.



Make trust your #1 priority

Trust is the hardest to gain, the easiest
To lose, and the more important to hold onto.



Make hope the centerpiece

It's not what happens to you...
it's what you do about it.



Real Stories

With JoJo Romeo

Look at everything as AFOG:
*“Another F*cking Opportunity For Growth”*

JOJO’S TWO TACTICS TO GROW:

1. **Put Together a Vision Board** - Pin the ideas and perspectives that you want to achieve and what you want the future to look like.
2. **List “I AM” Statements** - “I am Grateful, I am Forgiven, I am Blessed, I Am Amazing...” and remind yourself of these every day.

Unconventional Consumer Direct

With Chris Nooney, Laura Edwards, & James Adair



5 Best Practices To Use Your Client Database

Advice from Laura Edwards

1

Segment Your Database

Categorize everyone into fans, supporters, neutral, or inactive

2

Ask for Their Business

In all marketing you do, ask for their business, it is a gift to have it and to help them

3

Speak to Them How They Want

Use all forms of communication that appeals to your consumers: email, voice, text, direct mail, etc.

4

Process Regularly

Look for opportunities (e.g. credit watch, savings in refinance, social media cues of a change)

5

Be Consistent

Set aside time every day for marketing



BREAKTHROUGH

SALES MASTERY



SALES MASTERY
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Women of Excellence

With Susan Hatfield, Stacia Weishaar, Austin Lampson
& Kristina Hubbard

After a successful last year, one of the most requested panels returned again in 2017. Top producing women of the industry discussed their strategies for success and maintaining a work-life balance.

My Non-Negotiable Hours Each Week

Advice from Susan Hatfield



4 Keys to Success

Advice from Stacia Weishaar



1

Lead with education and transparency

2

Be available and responsive

3

Execute with excellence

4

Give back tenfold, and not just money





Trust, Trends & Technology

With Mark Raskin & David Stevens

The Millennials are coming and they will reshape the mortgage industry, with **12M to 14M new households** being formed. The key for originators to win this massive business? **Technology**. It will be the great divider and differentiator for originators.

As the market moves to a purchase heavy environment LOs will have to **adapt and adopt technology**. Now is the time. In addition, attracting and retaining a team of quality LOs will be critical for success.

Tom Ferry



“The only way to achieve breakthrough is to operate at level 10, in all areas of life...with no apologies!”



The Five Disciplines of Execution

Advice from Tom Ferry



1

Goal

Set a wildly important goal

2

KPIs

Determine your key performance indicators

3

Scoreboard

Track your performance visually

4

Accountability

Up your cadence!

5

Celebrate

Frequently make time to celebrate success!





5 Tricks

to Improve Your Marketing

Advice from Tom Ferry

- 1 Simplify Your Offer**
- 2 Model Best in Class Sites**
- 3 Make it EASY to Schedule Appointments**
- 4 Create a Culture of ABT
(Always Be Testing)**
- 5 Ask! - Email, social, mail, phone, LP or chat?**

RESOURCES FOR EASY SCHEDULING

CALENDLY - www.calendly.com

CRYSTAL KNOWS - www.crystalknows.com

Meet our 2017 Speakers

Click to learn more



Todd Duncan



Deb Duncan



Erin Lantz



Tom Ferry



Sue Woodard



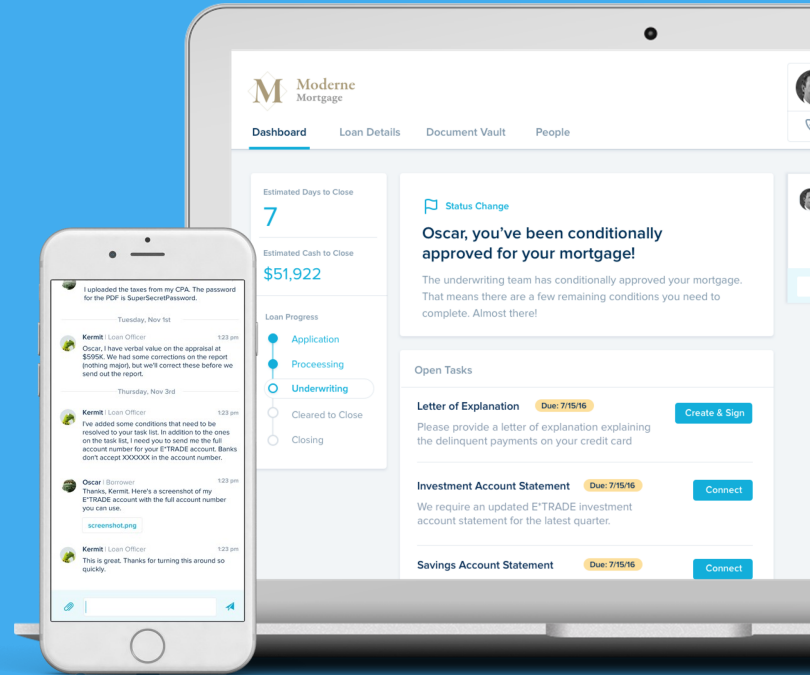
Jonathan Roche



JoJo Romeo



Justin Flom



High Trust + High Tech

Technology is your asset to breakthrough and delight your borrowers.

Meet Maxwell, the lightweight borrower portal to connect you and your team with the homebuyers and agents you serve every day.

We believe originators will win by betting on the augmentation of human ability, not by replacing it with faceless technology. That's why **producers on Maxwell close loans 45% faster than the national average.**

In 2017, Maxwell was named one of the most innovative companies in real estate by HousingWire Magazine. Every day, our cloud software is used by top producers across the U.S. to serve thousands of homebuyers. Maxwell is funded by venture capital firms in Silicon Valley and New York City. We're proud to be built in Denver, Colorado.

Request Info

www.himaxwell.com

Sales Mastery 2018

October 10-13, 2018 in San Diego, CA

2018 TICKETS

TODD DUNCAN'S
SALES MASTERY

25 YEARS

1992 - 2017



— These hand-crafted —

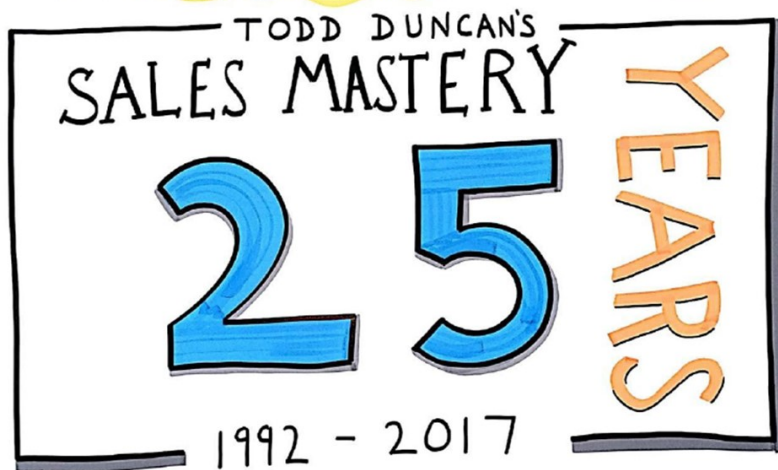
Visual Summaries

were created in real-time
at Sales Mastery 2017 in San Diego

— Oct 3-6 —



Welcome



BREAKTHROUGH

A DEDICATION

WE LOVE YOU, BROTHER

BRIAN FRASER

#STAYSTRONG

BRIANFRASERFUND.COM

in memoriam

THE OFFICIAL LEADERSHIP LIVE

Unofficial Kick-off for SALES MASTERY 2017

WELCOME

TODD DUNCAN: I WANT TO GET YOUNGER.

JIM McQUADE: DO IT AGAIN... (WITH ME) (WITH ME) (WITH ME)

TRAINING - ZAL - NEXT GEN of Loan Officers

#HONESTY, #SMARTS, #PRESSURE

YOU'RE FIRED

5 CONTACTS

2 TOTAL COST ANALYSIS

1 LOAN APPLICATION

#LOYAL TEAM

#HAPPY LIFE

MARK RASKIN: I'm Not For Everyone.

Leadership is... 1) OWN THE PROBLEMS 2) SHARE THE CREDIT

CHECK YOURSELF

#SELF AWARENESS

(P.S. WE ALREADY KNOW YOUR WEAKNESSES...)

SECRET PERSONAL BOARD OF ADVISERS

#COFFEE & COACHING

TREAT PEOPLE as PARTNERS

THEN, LET GO...

#fail FORWARD

INFLUENTIAL IMPACT - in the LIFE OF A HUMAN

The Most Important DEFINITION of Leadership

#TECH ENABLED

DAN HANSON: B2B B2C

DISRUPTION IS THE NORM!

KEY PARTNER LISTING AGENT...

IN THE FUTURE

THE SPECIALIST

TECH ENABLED AWESOME

OWN THE LEAD

THE REFERRAL TEST

What we know...

- ⌚ NO TIME AMBIT
- 📅 NO DAILY BUC PLAN
- 🗨️ NO REFERRAL COMMITMENTS
- 👤 NO PARTNER PLANNING SESSIONS
- 🚫 NOT SEEKING PARTNER LEADS
- 📱 NOT CONFIDENT IN PHONE SCRIPT
- 🗨️ NOT FEELING EFFECTIVE AT FACE-TO-FACE CONSULT
- 📱 NOT COMFORTABLE w/ BROWSE PRESENTATION
- 🚫 NOT READY TO HANDLE OBJECTIONS

90% No Good

get out your phone... AND SHARE YOUR TRUTH w/ GAETH GRAHAM

PIPKI

DAILY

WEEKLY

DAILY

WEEKLY

DAILY

WEEKLY

DAILY

WEEKLY

BREATHTHROUGH! SALES MASTERY 25th ANNIVERSARY #SALESMASTERY2017 HIGH TRUST.COM

Visual Summary by WHITEBOARD ACADEMY

BREAKTHROUGH

It's Time For A Breakthrough!

WHEN

1) WHEN THINGS AREN'T WORKING

2) WHEN THINGS COULD WORK BETTER

3) WHEN THERE'S AN ENTIRELY NEW WAY

#WHAT THE

WHO DOES THAT?

PAID to influence

THE WRONG WAY IS THE RIGHT WAY - BECAUSE IT HELPS YOU FIND A BETTER WAY

BE MORE OF WHO YOU ARE!

#FIND your LANE (AND STAY IN IT!)

MAKE HOPE the CENTERPIECE

break downs ARE TEMPORARY, BREAKTHROUGHS are forever.

TRUST

THE ONLY THING that matters

empathy

RELATIONSHIP

Connection

3 QUESTIONS:

How Would FUTURE YOU handle this?

How Would I CHANGE?

WHY DOES IT MATTER to me?

"WHEN IT COMES TO MONEY, I HAVE 17,000,000 OPTIONS and I choose a human."

#THELOTAMoneyBusiness

TURN DOWN THE PROMOTION! | turn up emotion

LOAN STRATEGY. PROFESSIONAL PRACTICE. EXCEPTIONAL EXPERIENCE.

Visual Summary
WHITEBOARD Academy
whiteboardacademy.com

BREAKING BAD

SUE WOODARD

OVERCOMING OBSTACLES

WHAT I KNOW I should do

#SinnerNotEasy

WHAT I'M ACTUALLY doing

taking ACTION

3 DEGREES of PROCRASTINATION

BEWARE

PAIN NOT COMFORT ZONE AVOIDANCE

D.O.T.

- define
- operation-alize
- take action

quick! 5-4-3-2-1 GO!!!

#DEADLY

inertia

#M.A.R.T.H.A. SIA YOU J.A.A.S!

life IS SHORT

DIS...STRAC...TION

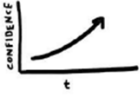
Perfectionist

Do ONE THING.

FEAR

BE YOUR OWN CAPTAIN!

Visual Summary
WHITEBOARD Academy
whiteboardacademy.com

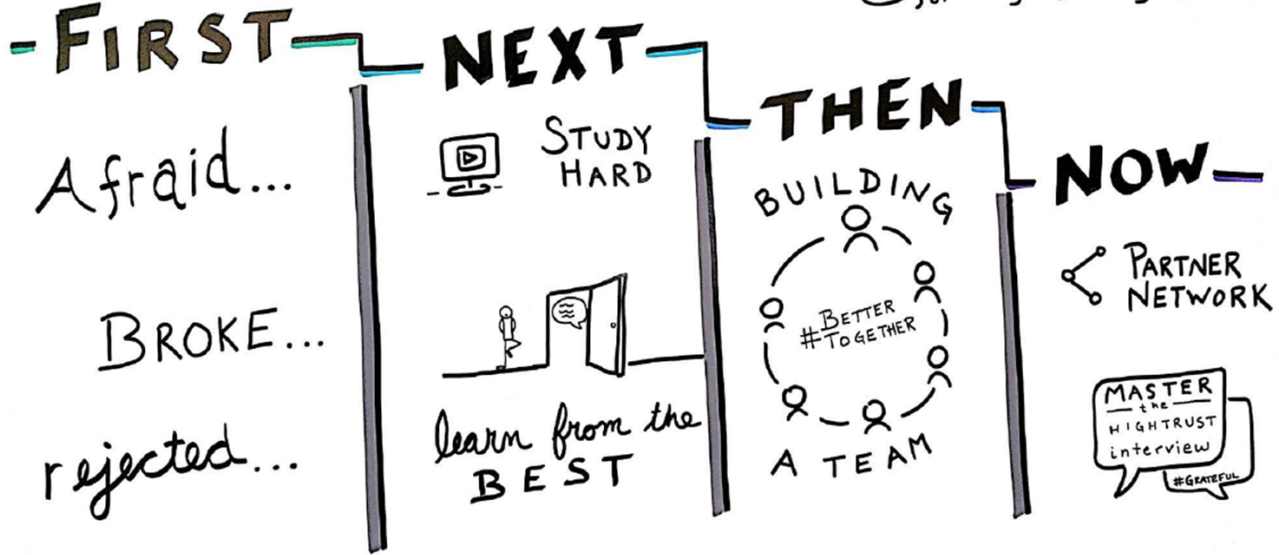


DOMINIC DANGORA

Power Session



KEEP GETTING BETTER
for my family

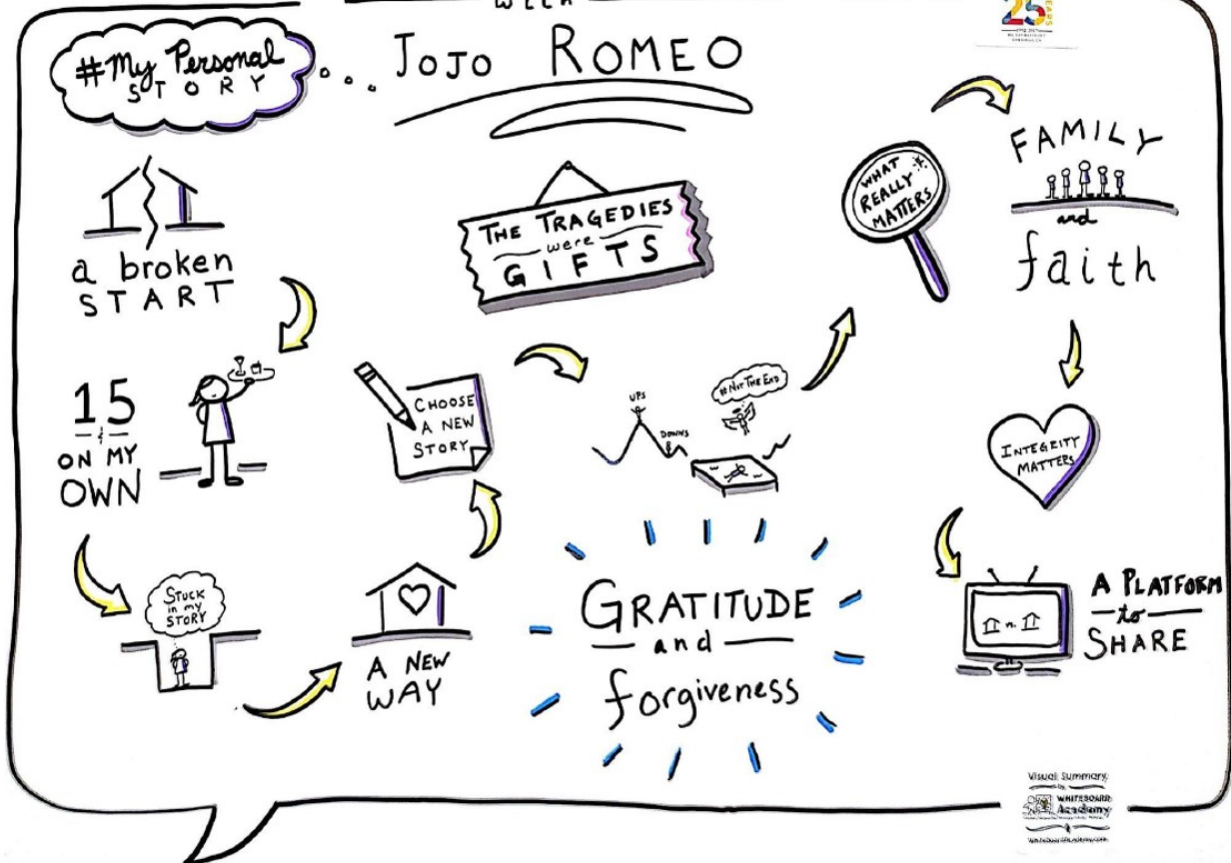


... AND MOTIVATED AF



REAL STORIES

with



Σ NIKKI GROFF Ξ

#IMPLEMENTATION ROCKSTAR
power session



TOP  MIND

WHAT IF...


...OUR CLIENTS WERE AMAZED



every time WE INTERACTED?

(THEY'D BE FANS for Life)

- ♥ HIGH TRUST
 - ✎ HIGH TOUCH
 - ☑ HIGH TECH
- ∴ (in this order)

 - GET THIS EARLY

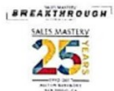
- [Custom CAMPAIGNS]
- ✉ txt
 - 📞 call
 - 📺 video
 - ✉ resources
- and more...



"☆☆☆☆"
MY EXPERIENCE WAS WOW!



EPIC BREAKTHROUGHS




JONATHAN ROCHE

job #1
MY ENERGY
MY VIBE
MY ATTITUDE

let me SERVE and IGNITE



TRAINED & READY for epic opportunities

TODAY is A GIFT



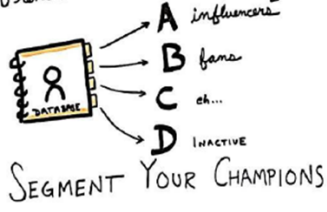
THANK YOU!
-your future grandkids

#BETTER everything

UNCONVENTIONAL CONSUMER DIRECT



TODD DUNCAN
LINDA DAVIDSON
CHRIS NANNEY
LAURA EDWARDS
JAMES ADAR

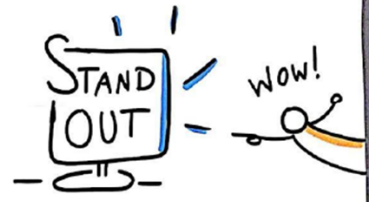


GET FOUND ONLINE .COM

THEN, life

IF your goal is SERVING OTHERS, NOTHING TO LOSE!

ASK!



FROM SUCCESS to SIGNIFIGANCE

- 1 engage YOUR TEAM
- 2 connect WITH COMMUNITY LEADERS
- 3 use YOUR NETWORK

Meet THEM WHERE THEY LIVE...

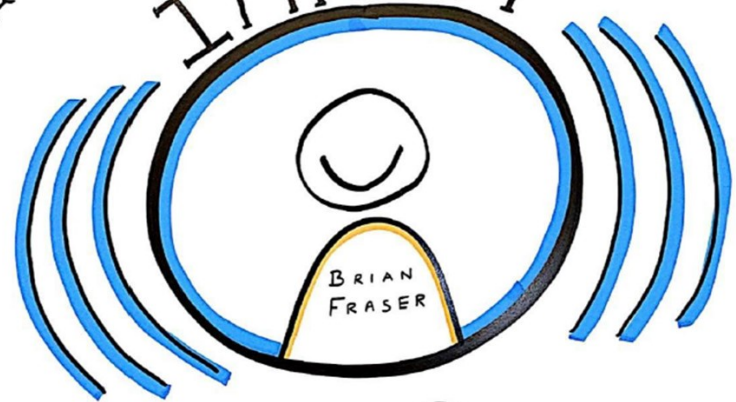


Visual Summary by WHITEBOARD ACADEMY

A LIFE of IMPACT



TODD DUNCAN
CODY STEINMANN
I AM different BECAUSE of HIM



BUILD FIRST THEN GROW

BEFORE... 60% of the time, WORKS EVERY TIME.



Too MANY BALLS IN THE AIR...

#PIVOT NEEDED

A Coach

- ★ CLARIFY
- ★ TRACK
- ★ ENCOURAGE

BUILD OTHERS — that they may — BUILD OTHERS

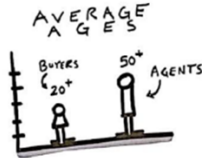
#multiply

Visual Summary by WHITEBOARD ACADEMY

HIGH TRUST TECH



Regardless
--OF--
TECHNOLOGY,
Relationships
WILL ALWAYS
MATTER



CUSTOMIZED
AUTOMATED
BRANDED
DIGITAL-FIRST
ACTUALLY USEFUL
COMMUNICATION



don't give them a reason
to SHOP AROUND...

BE A Hero



HELP AGENTS
BE
AWESOME!



OBJECTIVE
DETAILED
NOT-SALESY



I WANT AN
ADVISOR!



WOMEN of EXCELLENCE



TRUST-BASED RELATIONSHIPS
i feel SAFE

CLARIFY
your
VISION



Pro Tips

- GET A COACH
- GET TRAINING
- GET IT DONE. y'all!



KEEP
GETTING
BETTER



EVERY
DANG
DAY



UNORTHODOX
TRAINING

OUR
DISCIPLINES
DEFINE
US

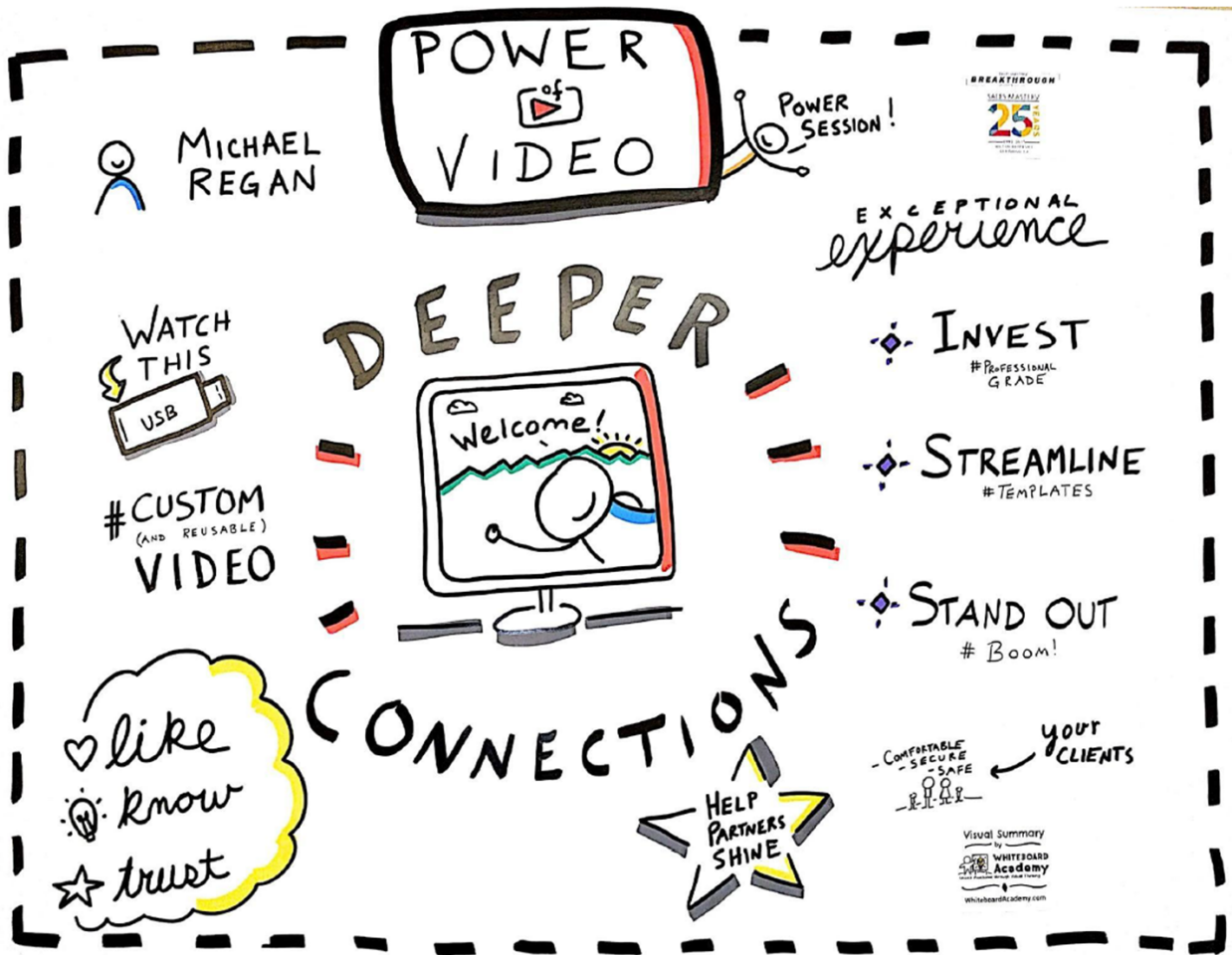


HIGH
STANDARDS
matter
#Lifes Too Short for crap...



#28
HOURS





★ ★ ★ ★ ★ five
STARS



Todd Duncan
RYAN GOSWAMI
MARTY PROSTON
DEB DUNCAN



WHEN CLIENTS BECOME SUPER FANS and you become friends

THE QUESTION: HOW Do You MAKE People feel?



WHAT QUESTIONS Do You HAVE?

"A PASSION to SAVE YOU MONEY KEEP YOU SAFE"



GIVE US THE BEST REVIEW ever

I'D BE CRAZY TO USE YOU - NOT -

AGENTS BUILD BUSINESS BUYERS FEEL SAFE

BEFORE DURING AFTER



TRUST, TRENDS and TECHNOLOGY



14 MILLION COMING OPPORTUNITIES
BY 2025
#THE DREAM IS ALIVE



THE DREAM THE FEAR
#Home Buying



i'll hold your hand

CLOSINGS MAY BE DONE REMOTELY



TRUST is a

face-to-face SKILL



LEVEL 10

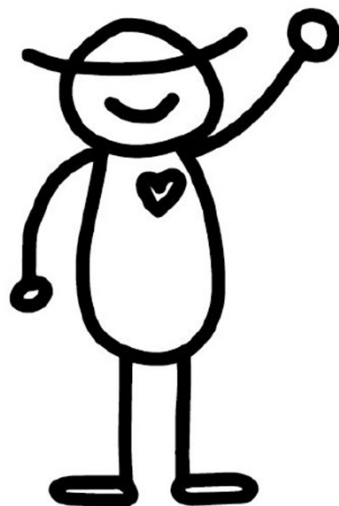
—no apologies—



WHITEBOARD Academy

Unlock Awesome through Visual Thinking

WhiteboardAcademy.com



Mike Schlegel
"Muddy"

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2018 TICKETS

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