

# Build Your Simplified Business Plan

## Part One: Volume Goals

Average Loan Amount \$ \_\_\_\_\_

Annual Closings Dollar Goal \$ \_\_\_\_\_

Annual Closings Unit Goal # \_\_\_\_\_

Determine Your "Pull Through" % % \_\_\_\_\_

Annual Origination Dollar Goal \$ \_\_\_\_\_

Annual Origination Unit Goal # \_\_\_\_\_

## Part Two: Chunk Down—Building Consistency

Annual Units Goal # \_\_\_\_\_

Monthly Units Goal # \_\_\_\_\_

Weekly Units Goal # \_\_\_\_\_

Daily Units Goal # \_\_\_\_\_

I need \_\_\_\_\_ loan(s) every \_\_\_\_\_ day(s).

## Part Three: Referred Pre-Qual Conversion and Follow-Up

Daily/Weekly Loans # \_\_\_\_\_

Conversion to Application % (#1 Improvement) % \_\_\_\_\_

Daily/Weekly Referred Pre-Qualifications Needed # \_\_\_\_\_

## Part Four: Referral Standards for Strategic Partners

Monthly Referred Pre-Qual Inquiries Needed # \_\_\_\_\_

Minimum Referred Pre-Qual Goal per Partner # \_\_\_\_\_

Total Referral Partners Needed # \_\_\_\_\_