

# Your Database is a **Goldmine**



**Every closed loan is  
either a future referral  
engine – or a dead end.**

# Today's Agenda



**The Problem**



**The Borrower Journey**



**The HOW**



**The 30-Year Client**

# The Problem (s)



## Low Repeat Business

Borrowers cave to media influence

Past clients reapply with a different lender  
— the one who stayed in touch



## Minimal Advocacy

Realtors refer those that are “memorable”

Satisfied borrowers rarely refer unless  
prompted and inspired to do so



# The Hard Truth

Your Past Clients  
Don't Remember You

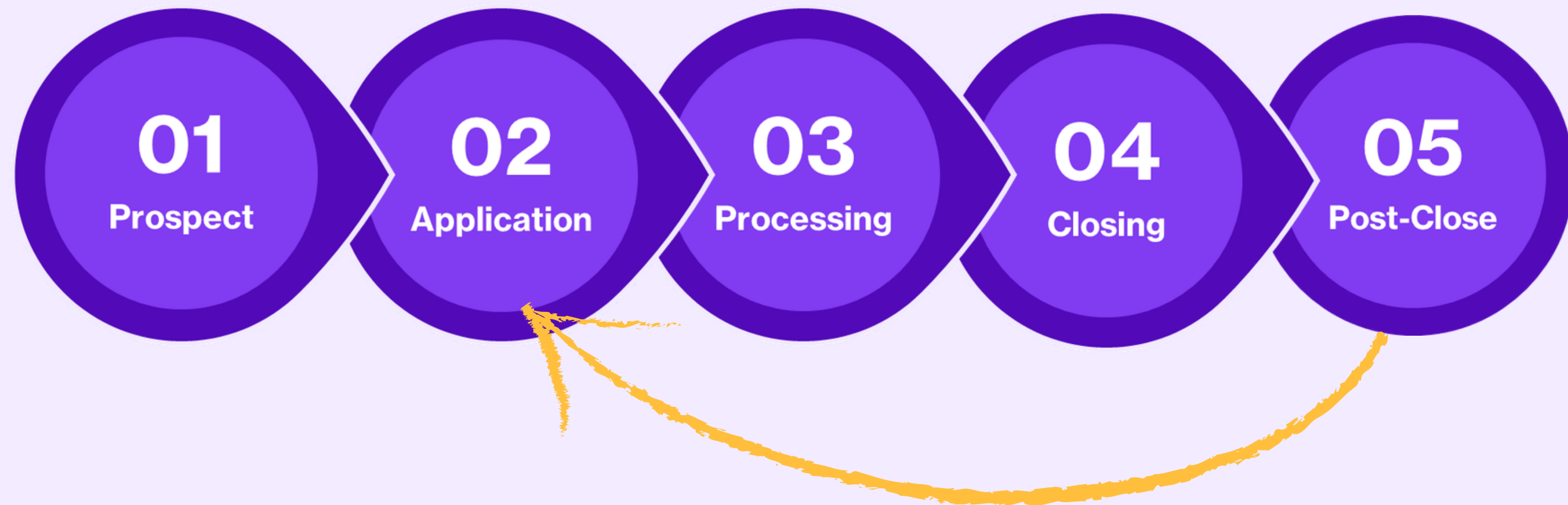
71% Forget in  
13 Months

Out of Sight-  
Out of Mind



# The Borrower Journey

Every stage is an opportunity to build trust--or lose it.



Most Lenders nail the transaction.  
The best lenders own the entire experience.



# HOW

to get that  
repeat business?

...and be Unforgettable



**Give More Value**



**Make the Relationship Personal**



**Offer After-Sales Support**



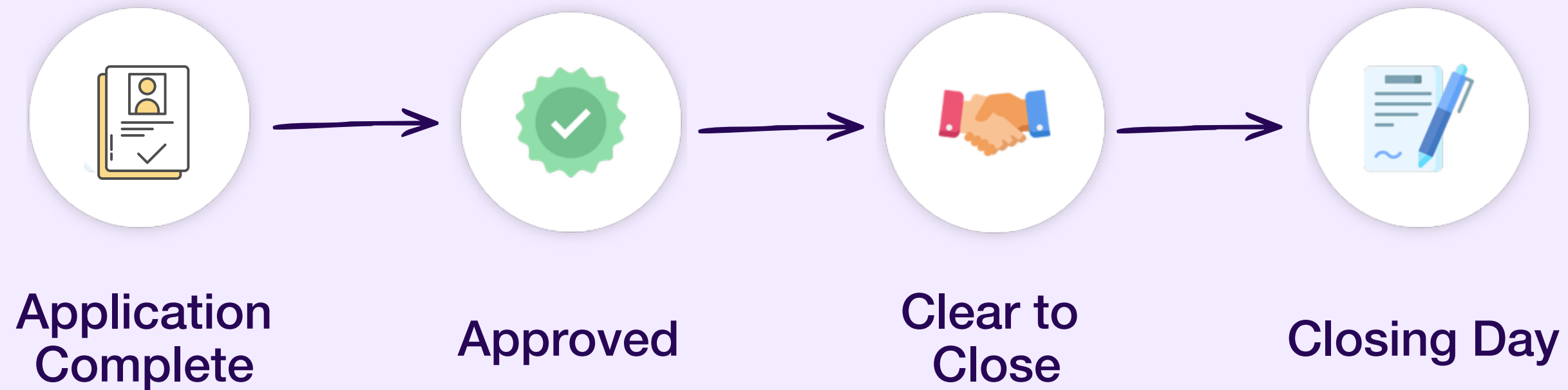
**Ask for Feedback**



**Be Visible**

**Simply Keep in Touch!**

# Operational Moments = Brand Moments



## The rule:

If it already triggers a notification, it can trigger a brand moment.



# Post-Close Communication

**The 30-Day  
Check-In**

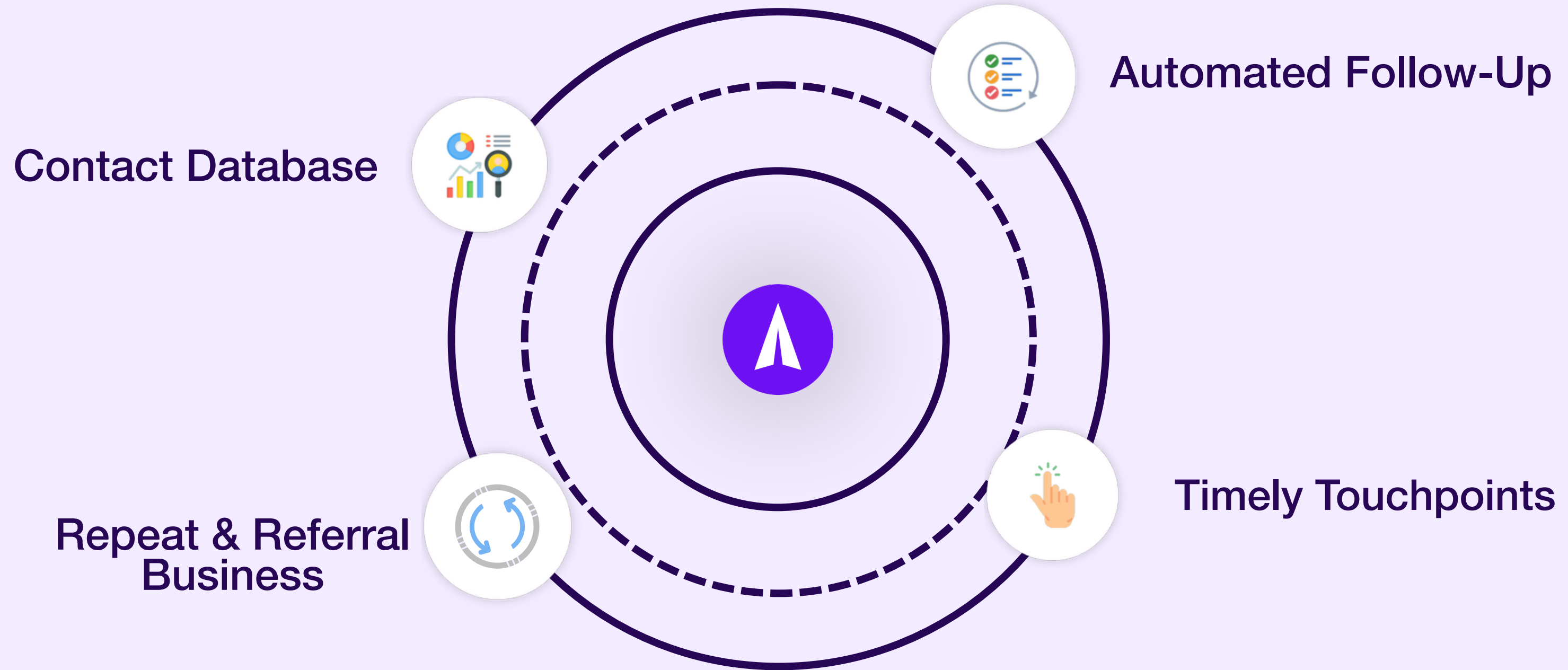
**Annual Home  
Check-In**

**Milestone  
Celebrations**

**Value First  
Content**



# A CRM



## A CRM

Can be your memory, your assistant---your retention engine all-in-one.

# 30 Years--NOT--30 Days

A single borrower relationship, nurtured over time, can yield:

3-4X

Repeat  
Loans

2-3X

More  
Referrals

\$0-\$25

Acquisition  
Cost



# Stay Unforgettable



1

## Map the Journey:

Know every touchpoint from app to 30+ years.

2

## Make Moments Matter:

Every operational update is a brand opportunity.

3

## Stay in Touch –The Right Way:

Valuable, timely, human.  
Not spammy.

4

## Let Your Tools Do the Work:

Automate consistency. Relationships scale.

**Your next client is sitting in  
your database right now...**

**Go Get Them!**

**Be Unforgettable.  
Get Repeat Business.**

