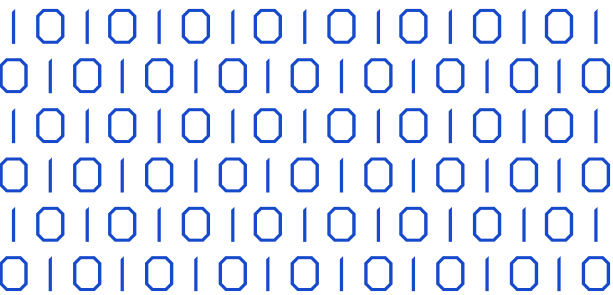
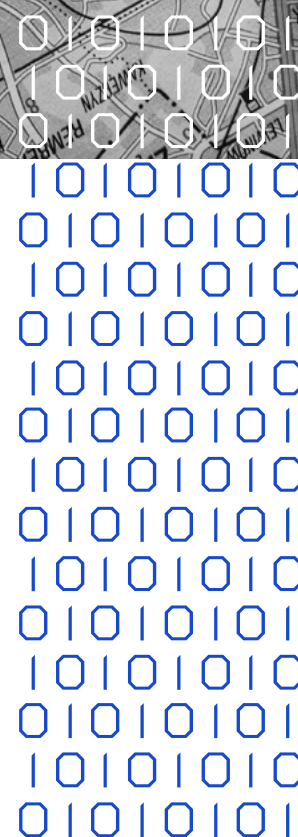


MMI
MMI.10

POWER USER
PLAYBOOK



Strategies & Tactics for Recruiting



STRATEGY NAME

LO Search

Knowing exactly what type of business a potential candidate could bring to the organization is critical to the recruitment process. With MMI's LO Search tool, you will be able to simplify and centralize your process for analyzing an LO's previous loan history and performance.

SUMMARY

■ What is it?

The ability to search for an individual LO matching your exact criteria.

■ Who is it for?

Anyone looking to recruit loan originators for a team, branch, or organization.

■ Where do you find it?

From the dashboard go to Mortgage then LO Search.

■ How do I do it?

Identify an LO by name or NMLS and then dive into their detailed Fast Fact profile.

■ When should you take action?

When you are looking to deep dive into the details of a specific candidate.

■ What if I do/don't do this?

If you do, you can ensure you have a total profile of the candidate you hire (or don't).
If you don't, you are relying on second-hand references or an LO's own self-reported details which might not be as reliable.



NEXT STEPS

- Under Mortgage and LO Search find an LO by Last Name or NMLS.
- Review the LO's current and past transactions as well as production trends.
- Once satisfied with the results, start taking action with next steps such as adding to your prospect list or favorites.
- Rinse & Repeat - Continue adding potential candidates to your list.

[Watch how-to video](#)

STRATEGY NAME

Identify & Target Loan Officers

Knowing how an LO is ranked is key to recruiting and knowing what type of business this candidate would bring to the organization and or team. MMI's LO Rank tool simplifies and centralizes your research to help find the best fit for your current criteria.

SUMMARY

■ What is it?

This is a snapshot of Loan Originators and the business they have done over the last 14 months.

■ Who is it for?

Anyone looking to recruit loan originators for a team, branch, or organization.

■ Where do you find it?

From the dashboard go to Mortgage then LO Rank.

■ How do I do it?

Sort by rank of your desired criteria then search and review the results to find an LO that looks like a match.

■ When should you take action?

Daily! MMI will always be updating, so as you are searching for the right candidate, MMI is there to help guide you with the search.

■ What if I do/don't do this?

If you do, then you have more valuable information on potential candidates.
If you don't, you might miss the perfect new hire!



NEXT STEPS

- Decide your search criteria such as volume, loan types, etc.
- Review list of LO and then choose to visit the Fast Facts Profile for further investigation.
- Once satisfied with results, start taking action with next steps. This includes tracking your favorites and further prospecting.
- Rinse & Repeat - Continue adding potential candidates to your list.

[Watch how-to video](#)

STRATEGY NAME

Target & Research Lender Offices

Targeting lender offices and identifying the top-ranked companies is another way to assist in your recruiting efforts. Not only can you search by roster, but you'll also get a map view that provides detailed geographic matches.

SUMMARY

■ What is it?

The ability to search and identify lender offices with a specific map or list view.

■ Who is it for?

Anyone looking to recruit loan originators for a team, branch, or organization.

■ Where do you find it?

Go to Mortgage Tab and then Lender Offices.

■ How do I do it?

Search by state, build search criteria, and then review in either list or map view.

■ When should you take action?

Daily. MMI updates regularly with the most up-to-date transaction data.

■ What if I do/don't do this?

If you routinely use MMI's lender office search you will identify and uncover more valuable information to use when speaking to candidates. If you don't, then you might miss key points of interest to the candidate of choice.



NEXT STEPS

- Under search tool, go to Mortgage then select Lender Offices.
- Choose the state and then follow prompts to build your search report.
- Once satisfied with the results, view either by list or map view, whichever best fits your strategy and approach.
- Rinse & Repeat — Continue adding potential candidates to your list.

STRATEGY NAME

Know Your Competition

Research the competition by pulling top lender companies and then diving in to explore even more. It's important to not only see where your competition is geographically, but also visualize the distribution and ranking of their LOs along with the type of business they are bringing to the table.

SUMMARY

■ What is it?

A quick, simple, effective way to see what your competition is up to.

■ Who is it for?

Anyone with access to mortgage data. Branch Managers, Sales Leaders, Recruiters, and organizational leaders.

■ Where do you find it?

Go to the Mortgage Tab and then Lender Companies.

■ How do I do it?

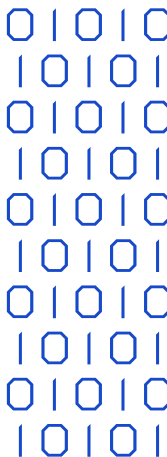
Search either by company NMLS or by name. Then view company rosters, market share with top real estate offices, and more.

■ When should you take action?

Today! Knowing your competition is key.

■ What if I do/don't do this?

If you use MMI to track your competition, then you not only know where you stand in the marketing, but also who is ahead of you and perhaps to go after. If you don't, then you stand to miss out on growth potential.



NEXT STEPS

- Using search tools, click Lender Companies under the Mortgage tab.
- Follow prompts to review companies within a certain state you are targeting - then filter down by selecting the Top 250 within reports.
- Displayed will be the top ranked companies within each state and provide details to their top producers and or the perfect match for your organization.
- Rinse & Repeat - Select a new area and continue searching.

STRATEGY NAME

Prospect Lists & LO Favorites

Keep your recruiting pipeline full by creating prospect lists and favoriting LOs in MMI. First, simply click the star to favorite an LO for future reference. Later you can add them to Prospect List along with other candidates for easy contact management.

SUMMARY

■ What is it?

This is a strategy that allows you to add prospects to a list to perform further research when ready.

■ Who is it for?

Anyone looking to recruit loan originators for a team, branch, or organization.

■ Where do you find it?

Go to the Mortgage Tab and then LO Favorites.

■ How do I do it?

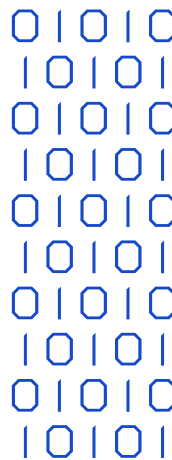
When researching a LO on his/her Fast Facts Profile you have ability to highlight the star next to their name. This automatically adds them to your favorite file.

■ When should you take action?

Any time you are researching and or contacting a potential new LO that has the extra talent you are looking for and you wish to continue conversations.

■ What if I do/don't do this?

If you add your favorites to this folder you will continue to have a list of candidates to work off of when recruiting. If you don't, then you have to start from scratch each time a hiring cycle starts.



NEXT STEPS

- Use search tools to find LO candidates that match your profile.
- When searching potential candidates favorite those that may be possible fit for your organization. Extra tip: Tag the candidate with a standard naming convention.
- Once you establish to move to next steps, add the candidate to your prospect list to continue communication by either importing them into your CRM or other recruiting tool.
- Rinse & Repeat as you continue to stack your pipeline.

[Watch how-to video](#)

STRATEGY NAME

Integrate into your CRM

CRM systems are commonly used with recruiting efforts and the ability to integrate MMI into your CRM can streamline and automate certain tasks.

SUMMARY

■ What is it?

MMI can be connected to most CRMs via webhook. This allows you to push contact information over directly from MMI when viewing a candidate profile.

■ Who is it for?

Anyone looking to recruit loan originators for a team, branch, or organization who organizes their recruitment efforts in a CRM.

■ Where do you find it?

On the Fast Facts Profile page next to an LO's name there will be a green icon

■ How do I do it?

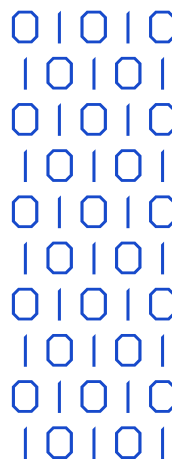
When you click the Add to CRM button a window will pop up where you can verify the info and then push the data into your CRM by initiating the webhook process that you or your IT team set up.

■ When should you take action?

Any time you believe you have found the candidate you wish to expand conversations with.

■ What if I do/don't do this?

If you use this tool and connect over to your CRM, then you can quickly add candidates to a campaign of your choice in your CRM. If you don't, you'll end up performing more manual work than necessary to move a contact into your CRM.



NEXT STEPS

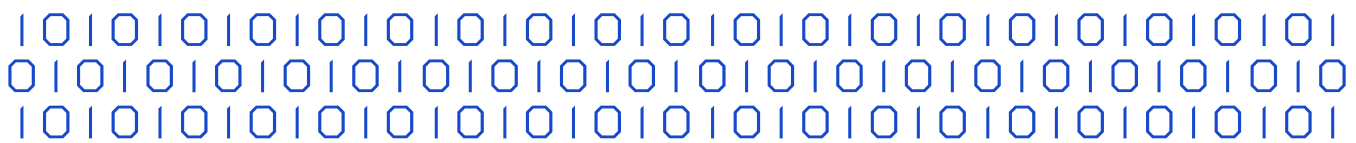
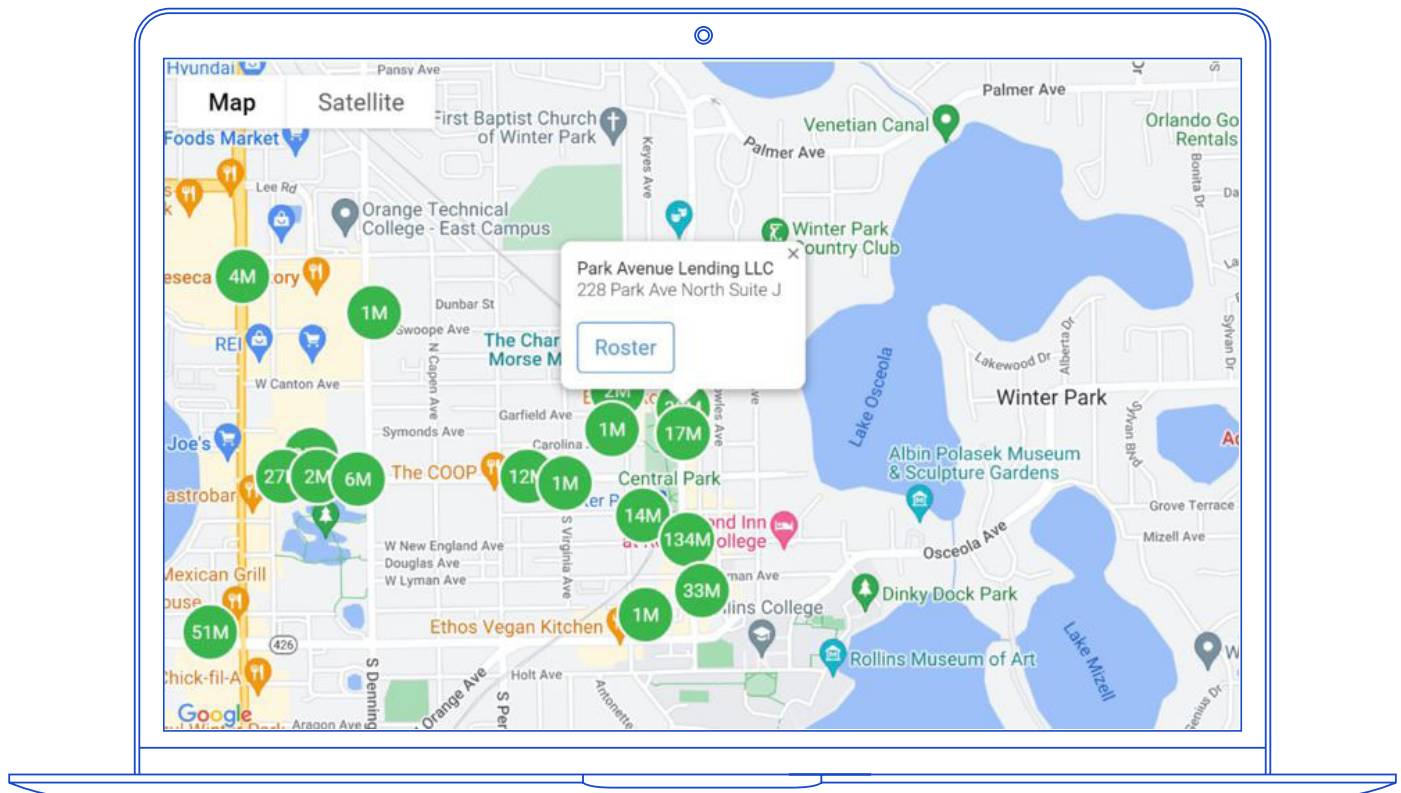
- Connect your CRM so MMI has ability to push data over. (You might need to contact a member of your tech team for assistance.)
- Build an automated campaign inside your CRM.
- Add in logic rules using notations such as PPS score to get the candidate started on the right path of communication.
- Rinse & Repeat - Continue pushing candidates into your CRM.

[Watch how-to video](#)

Bonus Tip

LENDER COMPANY MAP SEARCH

You can go to the **Lend Co Search by Map** under the Mortgage dropdown to use a map view as another point of research. The map view allows you to search by city to see at a glance the lender companies (along with their 14-month average of volume) in this area. Your team can then follow the strategies outlined throughout the playbook to take further action.



BONUS

Recruiting Presentation

Get the ball rolling by using this simple three-step recruiting process in conjunction with the supplied presentation template that you can customize for your business.

SUMMARY

- 1** An added bonus is that MMI offers Property Monitor which provides regular alerts that open up new opportunities for more repeat and new business in the future.
- 2** Also in addition the LO has the ability to view their past transactions specific to their Buyside / Listside Agents.
- 3** Loan Officers work hard for their business and typically when they leave an employer they do not get to take their database with them. Let them know you have the answer to this problem with MMI's LO/ Agent Wallet Share video.

Download presentation