



canada mortgage brokers inc.

CMB Marketing Plan April 2016 – March 2018

Mortgage Agent / Broker Name: _____

Annual Targets	Commission \$ _____	# of Mortgage Deals _____
Centers of Influence (COIs)	Existing #	New Target #
Prospecting Block Time	Hours per Day #	Days
Recruits Annual Target	Existing #	New Target #
Connections per week	Telephone #	Meetings #
Training & Development	Meetings	Other
Referral Targets	Asks per week #	Leads per week #

List 100 COIs (5-10 names for each) COIs can refer you mortgage business

1. Lawyers
2. Accountants
3. Bankers / Mortgage Specialists
4. Insurance Agents / Brokers
5. Hair Stylist / Barber / Dentist / Doctor
6. Religious Group
7. Realtors
8. Builder Sales Sites
8. Investment Advisors
9. Family / Friends
10. Customers
11. Others.

Sales Activities

1. Telephone / Face to face
2. Email / Outbound
3. Sales Presentations
4. Prospecting List / Sales List
5. Shows / Exhibitions
6. CMB Sales Meetings
7. Write Down Sales Objections
8. Sales Script
9. Follow-up Diary
10. Track / Review Block Time
11. Advertising / CMB Sales Programs

Personal Marketing Plan Review

Date of Review	Above \$ Target / Below \$ Target	Changes Needed
June 2016		
September 2016		
January 2017		
June 2017		
September 2017		
January 2018		

C.M.B. Canada Mortgage Brokers Inc.

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