

How To Succeed in Broking

**The ultimate guide to generating clients
for mortgage brokers**



Purple
Thread
Marketing



Step One
Craft a Powerful
“Professional Persona”



LinkedIn

5 STEPS TO 30 REFERRALS



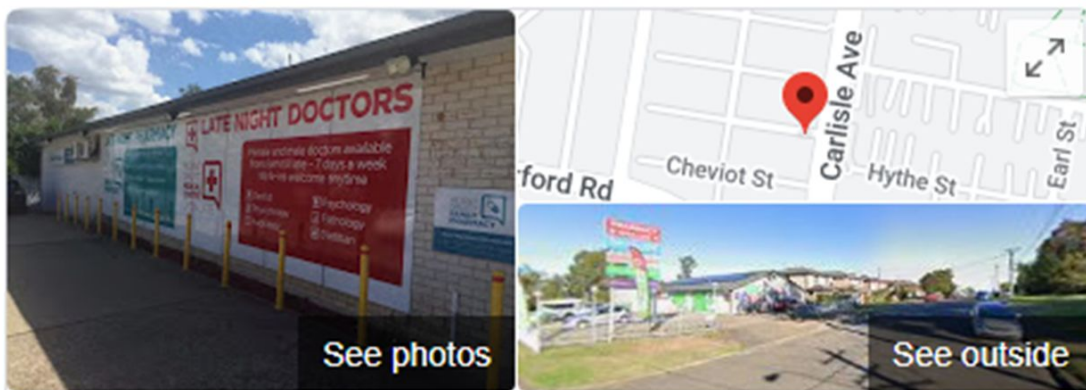
Darrell Weekes  



Purple Thread Marketing

The Ultimate Mortgage Referral Blueprint | The Mortgage Professionals Marketing Strategist | Unlocking The True Power of Referrals and Organic Leads | Australia's First Mortgage Industry Coach | Speaker | Author





Mt DrUITT Health Care Medical & Dental Centre

[Directions](#)

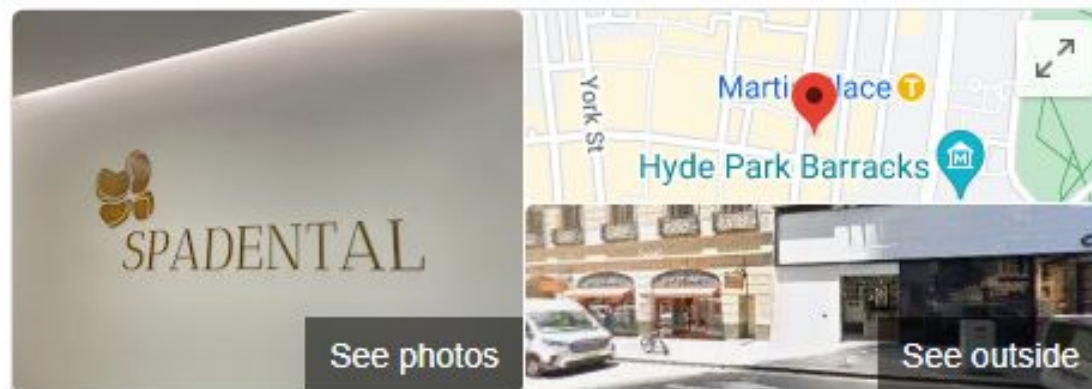
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2.0 ★★☆☆☆ 119 Google reviews

Medical center in Mount DrUITT, New South Wales

Address: 1 Calala St, Mount DrUITT NSW 2770

Phone: (02) 9832 4488



Spa Dental Sydney CBD

[Website](#)

[Directions](#)

[Save](#)

5.0 ★★★★★ 356 Google reviews

Dental clinic in Sydney, New South Wales

Address: Suite 2 level 4/64 Castlereagh St, Sydney NSW 2000

Hours: Closed · Opens 8 am Tue ▾

Phone: (02) 9221 8348

erik brown realtor



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erikbrown.com

<https://www.erikbrown.com>

Beverly Hills Real Estate Agent | Erik Brown | Realtor Agency

Are you in search of a **Realtor** who can turn your **real estate** dreams into reality?

Meet **Erik Brown**, a dynamic Beverly Hills **Realtor**. With a track record that ...

Client success stories

Erik has a deep passion for service and has been one of the few ...

Luxury real estate agent

About Erik Brown | Luxury Real estate agent in Beverly Hills ...

Erik Brown`s team

In the real estate team, Bruce is a veteran agent since 2010, who ...

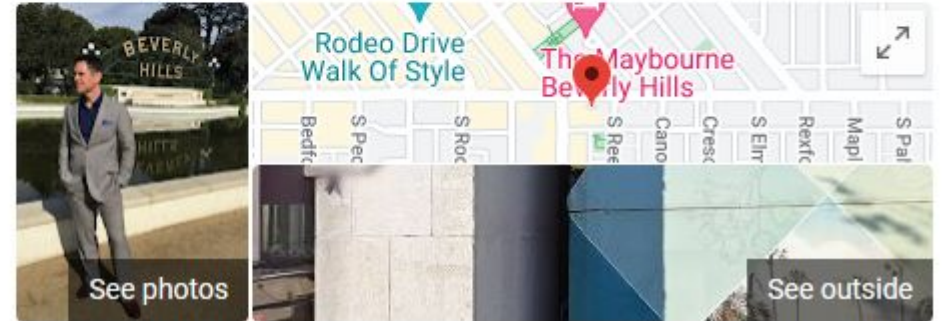
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Sell Your Home Like a Celebrity · THIS LUXURIOUS GUIDE IS ...

Home Sellers

Erik Brown · Success Stories · CONTACT US · Beverly hills ...

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Erik Brown - Compass Real Estate Agent in Beverly Hills, CA

5.0 ★★★★★ 252 Google reviews

Real estate agent in Beverly Hills, California

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Service options: Online appointments · Onsite services

Address: 9454 Wilshire Blvd, Beverly Hills, CA 90212

Hours: Closed · Opens 8 AM Fri ▾

Phone: (424) 333-6697

[Suggest an edit](#) · [Own this business?](#)

Businesses :



Erik Brown - Compass Real Estate Agent in Beverly Hills, CA

5.0 ★ (252) · Real estate agent

20+ years in business · 9454 Wilshire Blvd · +1 424-333-6697

Closed · Opens 8 am Fri

Provides: **Best Real Estate Agent Beverly Hills**



Website



Directions

Christophe Choo - Coldwell Banker Global Luxury Real Est...

5.0 ★ (55) · Real estate agency

30+ years in business · 301 N Canon Dr E · +1 310-777-6342

Open 24 hours

On-site services · Online appointments



Website



Directions

Scott Goshorn - Luxury Real Estate Agent in Beverly Hills, ...

5.0 ★ (44) · Real estate agent

10+ years in business · 202 N Canon Dr · +1 323-251-5479

Closed · Opens 8 am Fri

"Scott has been such a **great real estate agent** for my wife and me!"



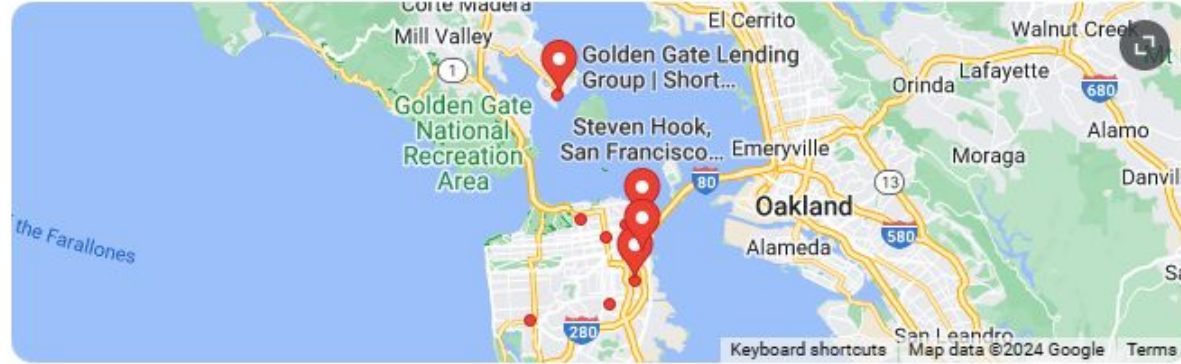
Website



Directions

More businesses →

Places :



Golden Gate Lending Group | Short Term Bridge Loans

You manage this Business Profile
4.9 ★★★★★ (33) · Mortgage lender
Tiburon, CA · (415) 706-8465

Closed · Opens 8:30 AM Fri
 "These guys are simply the Best."

Website Directions

Julie Malta- Guarantee Mortgage NMLS #254124

5.0 ★★★★★ (51) · Mortgage lender
232 Townsend St · (415) 203-6800

Closes soon · 7 PM
 "Communicative, informative, and secured us the best rate possible."

Website Directions

Mike Koran - Primary Residential Mortgage Inc

5.0 ★★★★★ (121) · Mortgage lender
1746 18th St · (510) 812-2815

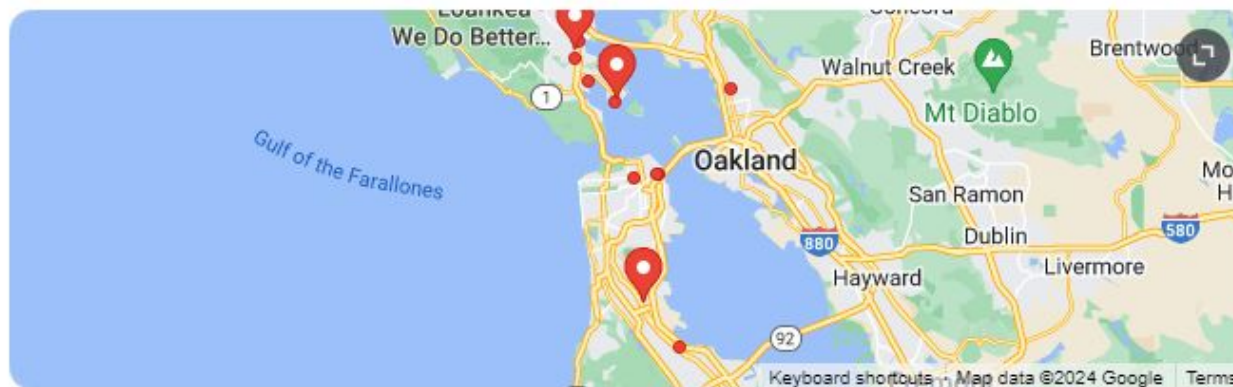
Closed · Opens 9 AM Fri
 "Best mortgage experience I've ever had."

Website Directions


More places →

e

Places :



Golden Gate Lending Group | Short Term Bridge Loans

 You manage this Business Profile
4.9 ★★★★★ (33) · Mortgage lender
Tiburon, CA · (415) 706-8465
Closed · Opens 8:30 AM Fri



Website



Directions

DiVita Home Finance, Inc.

5.0 ★★★★★ (20) · Mortgage lender
Tiburon, CA · (800) 239-1103
Closed · Opens 9 AM Fri



Website



Directions

California Mortgage Company, Inc.

5.0 ★★★★★ (1) · Mortgage broker
South San Francisco, CA · (650) 873-2228
Closed · Opens 9 AM Fri



Website



Directions

More places →

Results for **Tiburon, CA** · Choose area

Places :

Golden Gate Lending Group | Short Ter...

4.9 ★★★★★ (33) · Mortgage lender
1680 Tiburon Blvd Unit 9 · (415) 706-8465
Closed · Opens 8:30 AM Fri



DiVita Home Finance, Inc.

5.0 ★★★★★ (20) · Mortgage lender
1610 Tiburon Blvd #102 · (800) 239-1103
Closed · Opens 9 AM Fri

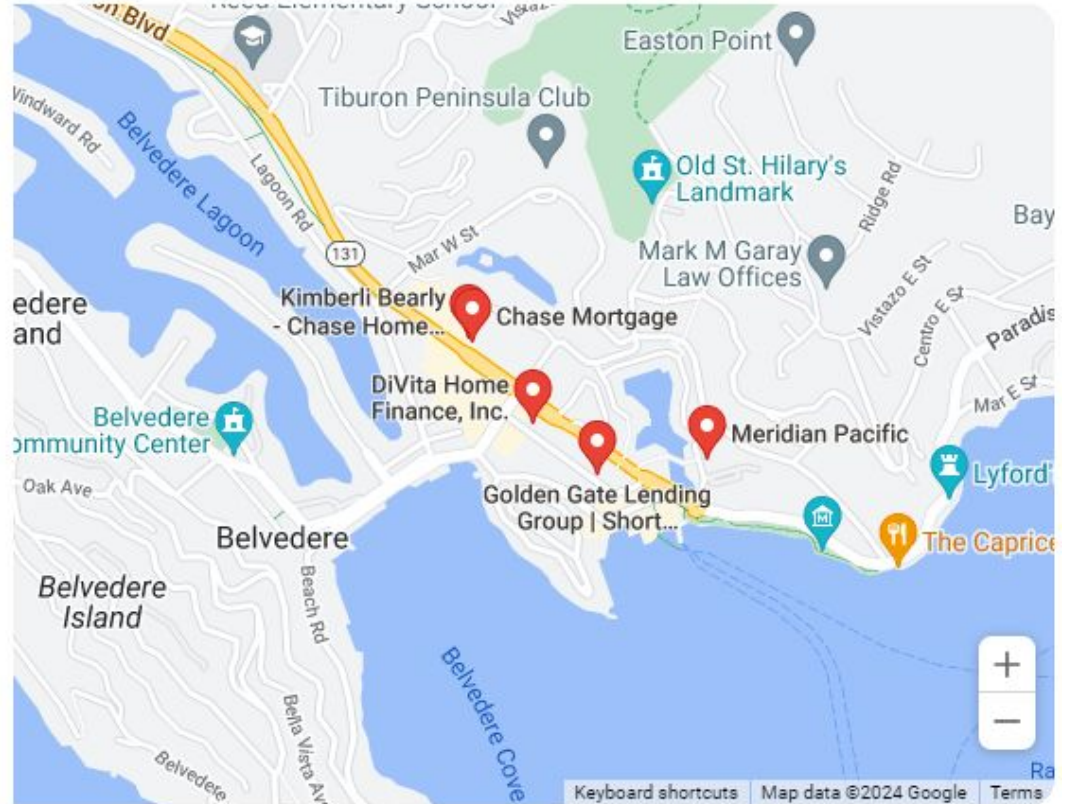


Chase Mortgage

5.0 ★★★★★ (1) · Mortgage lender
1535 Tiburon Blvd · (415) 435-5051
Closed · Opens 9 AM Fri



More places →





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[Website](#)

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5.0 ★★★★★ 172 Google reviews

Marketing consultant in Goulburn, New South Wales




You manage this Business Profile ⓘ

Address: 56 Clinton St, Goulburn NSW 2580


Hours: Open · Closes 6 pm ▾

Confirmed by this business 5 weeks ago

Phone: 0418 166 854



Google Business Profile
SEO tips
that will get you ranked





Salt your GBP page with Keywords




Ask for reviews with the key words in them






Include keywords in your responses



Turn negative reviews into positives
using keyword heavy responses





Salt your mine with keyword loaded
questions and answers





Fill your product section with keyword
loaded descriptions




Complete your services section



SEO photos





Be aware of the
“People often mention”
feature

Purple Thread Marketing

56 Clinton St, Goulburn NSW

5.0  172 reviews 

People often mention

All

marketing strategies 50

information 17

insightful 16

coach 15

+6

Sort by

Most relevant

Newest

Highest

Lowest

Mt DrUITT Health Care Medical & Dental Centre

1 Calala St, Mount DrUITT NSW

2.0  119 reviews 

People often mention

All


receptionist 35

clinic 12

call 10

professional 8


+6

 Write a review




Encourage potential clients to Google You







Step Two


Build a Referral Network






**The 10 Steps to Building
a Referral Network
in Just 25 Days**
without any cold calling, door knocking
or paying for referrals





The 8 problems I see when Mortgage Professionals try to build a referral network





Don't know where to start





No plan or strategy



Don't know who to call



Don't know what to say



Don't know how to approach



No Accountability



Call Reluctance







Don't understand the currency

Referrers value






Ask not
“what can you do for me”,
but rather,
“what can I do for you”?







Referrals are precious





When you receive a referral,
the referrer puts their
reputation in your hands





No matter what happens,
it will be your fault!





Step 1

Create a contact list



Everyone in and out of your sphere fall
into one of four categories

- 
- Friendships
 - Relationships
 - Contacts
 - Connectors
- 



Step 2

Create and learn your script





The Contact List Call Rules





Ask for their help




Tell them why you need their help





Prompt for names



Ask
“Should I call them”
and
“Can I mention your name”



Thank them for their help



Send an unexpected gift to
reward the behavior



The emphasis here is:

"SHOULD I GIVE THEM A CALL?"

And

"CAN I USE YOUR NAME?"





Step 3


Call your contacts and compile your list of potential referrer Prospects





Step 4

Create and learn your script for your
referrers Prospects






Step 5

Phone your referrer Prospects and
secure a face to face meeting





Referrer Prospect Call Rules


- Cold calls suck
 - This is a warm call because it's a referred call
 - Use an Assumptive Approach
 - The sole purpose of the call is to get the appointment
 - Don't tell them what everyone else tell them
 - Tell them why you'd like to meet
- 



Step 6

Attend the appointment and assess the Prospects suitability as a referral source






The primary objective of the appointment is for you to interview the lead so you can determine if they qualify as a potential Referrer and whether

YOU

would like to develop a business relationship with them.





Step 7


Revisit your Prospects to present your pitch or diarise to make a courtesy call





Step 8


Prepare your pitch for the
Prospects you revisit,
and courtesy call the leads you don't





Step 9

Meet again with your Prospects again
and deliver your pitch





Step 10

Follow up your Prospects with a call
one week after your pitch





QUESTIONS?

