



Elevate Mortgage Case Study: Matthew H.

AT A GLANCE

OPPORTUNITIES

- To better understand mortgages.
- To grow in sales skills.
- To increase confidence in working with real estate agents.

OUTCOMES

- Increase in confidence throughout the entire process.
- Strong production results.

“One of the big things [I learned] was to just stay focused on the activity and make processes for things. I realized I wasn't completely alone, staring at the computer wondering how I would get deals in.

Breaking it down step by step - if I call people, I set meetings, and if I say this, then they will send me deals. Elevate Mortgage made me confident to even have those conversations.”

MATTHEW H.

Loan Officer

Cross Country Mortgage

CHALLENGES

Matthew began Elevate Mortgage having never originated a loan, and like most individuals who participate, he needed help navigating mortgages as well as growing his sales skills. There was also an opportunity to grow confidence in his field so he could better communicate with real estate agents.

SOLUTIONS

The Elevate Mortgage philosophy is based on the belief that a loan officer is first and foremost a salesperson. So, alongside learning the basics of mortgages for the first eight weeks of the six-month course, Matthew also immersed himself into sales training.

The sales techniques covered included:

- How to identify potential referral partners
- How to set appointments
- How to have effective sales presentations
- How to close
- How to manage time
- How to leverage current relationships for additional referrals

Elevate Mortgage is a live virtual training, not pre-recorded, so Matthew was able to ask questions as they came up in real time.

RESULTS

Although 2023 has been a notoriously challenging year for the mortgage industry, Matthew closed four transactions within the first six months and an additional four additional closings the following two months.

Matthew has the tools needed to grow his business, building it from the ground up because of Elevate Mortgage.