

## THE NEXT LEVEL DIFFERENCE

### Simply put: it's unwavering execution—Next Level results

The Next Level delivers performance consulting to sales organizations, client service organizations, and call centers. We focus relentlessly on boosting the key metrics that matter most to your business. Example project goals include:

- Increase sales and profitability
- Transition a service organization to a sales organization
- Improve coaching, accountability, and follow up skills of leadership team and sales and service managers
- Transfer best practices to everyone on the team
- Increase business with existing customers
- Improve employee morale and retention
- Improve productivity per salesperson
- Shorten the sales cycle
- Improve conversion rate over phone or face-to-face

Each of these initiatives is achieved through a customized program based around company, industry and cross-industry relevant best practices.

Contact us today to learn how to take your performance to The Next Level.

## CLIENT

### Mortgage by Internet.Com

A division of North American Savings Bank

## PROJECT FOCUS

Improve sales and productivity of their team of loan consultants by developing and implementing a consistent sales and coaching process

## OVERVIEW

Mortgage by Internet.Com is North American Savings Bank's (NASB) retail lending division and is located in Overland Park, KS. They have a team of approximately 50 loan consultants that source and process prime and non-prime home loans. The Next Level introduced and helped Mortgage by Internet.Com implement a sales process and sales management coaching system that focuses on:

- One on one Goal Setting Meetings
- Conducting motivational and effective sales meetings
- Holding loan consultants accountable to performance metrics
- Train, implement, and reinforce a consistent selling process

## OBJECTIVES

The objective of the program was to implement a consistent selling process that all loan consultants would follow that would generate superior results and secondly to implement a coaching process that would reinforce the selling process. The Next Level developed customized training materials and job aids for their loan consultants and team leaders based on Mortgage by Internet.com and industry best practices. We then transferred these best practices to their entire team. Following the initial roll out of the program, we conducted four months of onsite coaching visits to hold team leaders and loan consultants accountable to using the best practices covered in training.

## RESULTS

Mortgage by Internet.Com has seen significant results that have been sustained and improved from March 2006 thru March 2007. Specific results include:

- Average Gross Fee Income per loan consultant is up from \$9,000 to \$28,000 per month
- Average revenue per loan has increased by 48%
- Lead to close percentage has improved by 4.6 percentage points
- Average income per loan consultant has increased by 51%, which has improved retention and morale

Productivity has improved across all major metrics for Mortgage by Internet.Com and as a result, they are attracting high producing and talented loan consultants from their competition.

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