One Big Media Company

🔑 GOHIGHLEVEL SNAPSHOT · MORTGAGE BROKERS & LOAN OFFICERS

Mortgage Agency Sales Kit

Pitch, outreach, pricing and onboarding to land and keep clients in this niche.

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THE OPPORTUNITY

Selling to mortgage

Your buyer: An independent mortgage broker or a producing loan officer at a lender, often with a processor or assistant. Their business runs on pre-approvals for purchase buyers, referrals from realtor partners, and staying in touch with past clients for refinance and repeat business.

Why they buy:

- Online leads shop several lenders and go with whoever calls first
- Pre-approved buyers go quiet during the home search and pick another lender at offer time
- Document collection drags on with endless 'did you send it yet?' calls
- Past clients never hear from you until another lender's refinance offer lands in their mailbox
- Realtor partner referrals don't get a fast, consistent response that makes the agent look good

Suggested resale pricing

Setup fee	Monthly
$997-$1,997	$297-$997

Loan officers value one extra closing a month highly, so price on the database and referral value, not message volume. Charge more when you manage rate-watch sends and lead ads, or set up multiple loan officers on a team.

Loan officers already have the most valuable asset: a database of past clients and pre-approved buyers. Sell the snapshot as the system that monetizes it, with rate-watch refinance alerts, annual checkups and same-day referral handling that keeps realtor partners happy. Run the database reactivation in week one, then stay on retainer by managing rate-watch sends, lead ads and monthly reporting on applications and closings.

CLOSE

Pitch script

Quick question: how many past clients and pre-approved buyers are sitting in your database right now, and when did each of them last hear from you? For most loan officers, the answer is it's been a while, and that's where other lenders step in. We install a system that texts every new lead within seconds and books them into a strategy call. Pre-approved buyers get helpful check-ins during the search, so you're still their lender at offer time. Under-contract borrowers get a clear road map and secure document reminders. Every past client gets an annual mortgage checkup on their loan anniversary, and when rates move, one tag sends a rate-watch alert that offers to run their refinance numbers, with no rate promises. Realtor referrals get same-day contact so your partners look good. It's all written to be compliance-friendly. Would it be worth 20 minutes to see it with your name on it?

Cold email

Subject: Your past-client database

Hi [Name],

I help loan officers in [City] turn their database of past clients and pre-approved buyers into more closings.

We set up a system that texts every new lead within seconds, keeps pre-approved buyers engaged during their search, sends annual mortgage checkups, and runs rate-watch refinance alerts when rates move. Realtor referrals get same-day contact automatically.

The copy avoids rate promises and is ready for your compliance team to review.

Open to a 15-minute call next week to see it?

[Your name]
[Agency]

Cold SMS

Hi [Name], [Your name] with [Agency]. We help loan officers in [City] turn past clients and pre-approvals into more closings with automated, compliant follow-up. Worth a quick 15-min look?

Social DM

Hi [Name], great to connect! We build automated pre-approval follow-up and rate-watch refinance alerts for loan officers. Happy to send a 2-minute demo if you're curious.

DELIVER

Offers & onboarding

Offer ideas for the client

- No-obligation pre-approval review for purchase buyers
- First-time homebuyer workshop co-hosted with a realtor partner (with costs split per RESPA)
- Annual mortgage checkup for past clients on their loan anniversary
- Rate-watch list: past clients and leads opt in to hear when a refinance might be worth reviewing
- Spring homebuyer readiness review for renters and early-stage buyers

Client onboarding checklist

- Collect: logo, brand colors, business hours, service area, Google review link
- Get access: domain/DNS, Google Business Profile manager, Facebook/Instagram admin
- Phone: buy or port a number, register A2P 10DLC, set up call forwarding
- Import the customer list (CSV) and tag it for the reactivation campaign
- Fill in the 20 custom values and publish the workflows
- Run a live test: submit the form, miss a call, book an appointment
- Book a 30-day results review with the client

KPIs to report monthly

- **Speed to lead**: Reply to every new lead within 5 minutes, including evenings
- **Lead-to-application rate**: Grow the share of new leads that start an application every quarter
- **Pre-approval to contract**: Keep pre-approved buyers with you through to their accepted offer
- **Realtor referrals**: Track referrals by partner and grow the number of active referring agents
- **Refinance reviews booked**: Book review calls from every rate-watch send
- **New Google reviews**: Ask every closed client and earn new reviews every month

General guidance only. This is not legal, tax, medical or financial advice. Results depend on your offer, market and execution.