



The Defining Difference
BY CINDY ERTMAN

Mortgage Satisfaction Assessment



The Defining Difference
BY CINDY ERTMAN

CINDY ERTMAN
The Defining Difference
www.TheDefiningDifference.com
Info@CindyErtman.com
Phone: 310-295-1130
NMLS: #330850




The Defining Difference
BY CINDY ERTMAN

Mortgage Satisfaction Assessment

NAME _____ DATE _____

- Each snapshot below represents an area of your mortgage business.
- Rate your satisfaction level in each of these areas by circling the number that matches your satisfaction level.

SATISFACTION SCORING: Zero (0) means not satisfied & Ten (10) means highly satisfied.

 <p># OF REFERRAL PARTNERS 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>	 <p>PERSONAL PRODUCTION LEVELS 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>	 <p>COMPELLING CLIENT EXPERIENCE 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>	 <p>MARKETING EXECUTION 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>
 <p>TIME, ENERGY & PRODUCTIVITY 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>	 <p>HIGH IMPACT TEAM 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>	 <p>GOOD SELF CARE 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>	 <p>WORK/LIFE BALANCE 10 Highly Satisfied 9 8 7 6 5 Satisfied 4 3 2 1 0 Not Satisfied</p>



Mortgage Satisfaction Assessment Action Items

- List one action item for each area to help you increase your score.



OF REFERRAL PARTNERS

Your Score: _____

Action(s) that you will take to increase your score:



PERSONAL PRODUCTION LEVELS

Your Score: _____

Action(s) that you will take to increase your score:



COMPELLING CLIENT EXPERIENCE

Your Score: _____

Action(s) that you will take to increase your score:



MARKETING EXECUTION

Your Score: _____

Action(s) that you will take to increase your score:



Mortgage Satisfaction Assessment Action Items

- List one action item for each area to help you increase your score.



TIME, ENERGY & PRODUCTIVITY

Your Score: _____

Action(s) that you will take to increase your score:



HIGH IMPACT TEAM

Your Score: _____

Action(s) that you will take to increase your score:



GOOD SELF CARE

Your Score: _____

Action(s) that you will take to increase your score:



WORK/LIFE BALANCE

Your Score: _____

Action(s) that you will take to increase your score:
