

Personal Strategy Mapping

Module 1: Developing *your* lead sources

Step 1

Pick three lead sources that feel like they might fit for you.

Step 2

For each of the three you picked, check all that apply:

- Will you show up consistently here for the next 30 days?
- Do you believe you can build trust with this audience?
- Does this align with how you naturally connect with people?
- Would this help position you as a trusted ally—not just another mortgage agent?

Step 3

Pick the lead source for which you've checked the most boxes. If you've checked them all for all three, pick the one you think will have the most impact while you start building.

Step 4

For the lead you've selected, what are three specific, actionable things you could do to get started in this space?

Lead Sources

1. **Facebook community groups** → Engage with questions, offer advice, and position yourself as a go-to mortgage resource.
2. **Webinars and ebooks (co-hosted or co-produced)** → Connect and educate.
3. **Local business cross-promos** → Collaborate for shared visibility.
4. **Realtor listing sheets & open house flyers** → Help realtors stand out and get in front of buyers before they talk to a bank.
5. **Referrals from past and/or unfunded clients** → Stay top of mind with people you helped, even if the deal didn't fund. It might be a better time for them now.
6. **Teaming up with trades** → Home inspectors, stagers, and contractors are great referral sources—especially for private sales or renovations.
7. **Partnering with professionals** → Build relationships with mortgage-adjacent professionals like realtors, lawyers, or financial advisors.
8. **Networking groups (BNI, local chamber events)** → High-trust, referral-oriented spaces where long-term relationships grow.
9. **Sponsoring local charity events** → Build visibility and trust in your community.
10. **Client Conversations** → Ask your funded clients if they will allow you to showcase their case on social media. This can be high impact if you can showcase your value.