

# SUPPORT WEBINAR INTERVIEWING LENDERS AND AGENTS



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# The five keys to a solid interview

1. Do your homework
2. Be specific
3. Types of business
4. Individual or team
5. Use your systems as a filter



# Do your homework

- Search Google<sup>®</sup>, Facebook<sup>®</sup>, LinkedIn<sup>®</sup> etc. to see what this person is all about.
- Look at comments and recommendations
- Look for qualifications and certifications



# Be Specific

**BE SPECIFIC**



- Be very clear about what you are looking for
- Understand specialties
- How do they operate and communicate

# Types of Business

- Look into the types of business the person is doing
- Does that specialty compliment your business?
- **NEVER** be a **PRETENDER!**



# Individual or team?

- There is a huge difference in working with each
- Get a clear picture of the players and job functions
- Who manages the relationship and contact points!



# Use your systems as your filter!



- Your systems need to be complimentary
- Opposites don't really attract!
- Investing in bad relationships never works

# Action Steps

Do you have access to local information?  
Get good at doing research before referring  
Be very clear about how and when you will  
communicate  
Set specific expectations!





The interview process is worth the effort.

Just like the dating process, don't be in a hurry to be "committed"



Like any situation, if you take the time to do the work up front, you can make sure you are working with the kinds of people worth your efforts!



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