



BROKER ESSENTIALS REVOLUTION

Membership Guide

IT STARTS WITH YOU



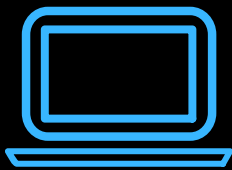
Broker
Essentials

MEMBERSHIP GUIDE



Broker
Essentials

Broker Essentials Revolution



PROCESS

A process for every part of your business! We explore every facet of running a brokerage to maximise efficiency and profitability. From loan processing, marketing, hiring staff and much more



MEASURE

From how you use your time to profitability per file. You will learn just what to measure in your business and what to do when you know how your business is or is not performing.



CLIENT

Learn about the customer journey before, during and after they experience you. Learn what the consumer of the future looks like and how do we meet their ever changing demands?

VIVA THE REVOLUTION

Evolution refers to the gradual development or changes in something over a period. The word 'revolution' means 'a turnaround'— a sudden, complete, or radical change in something, and that's what your business needs in an every changing world of broking.

100%

Committed

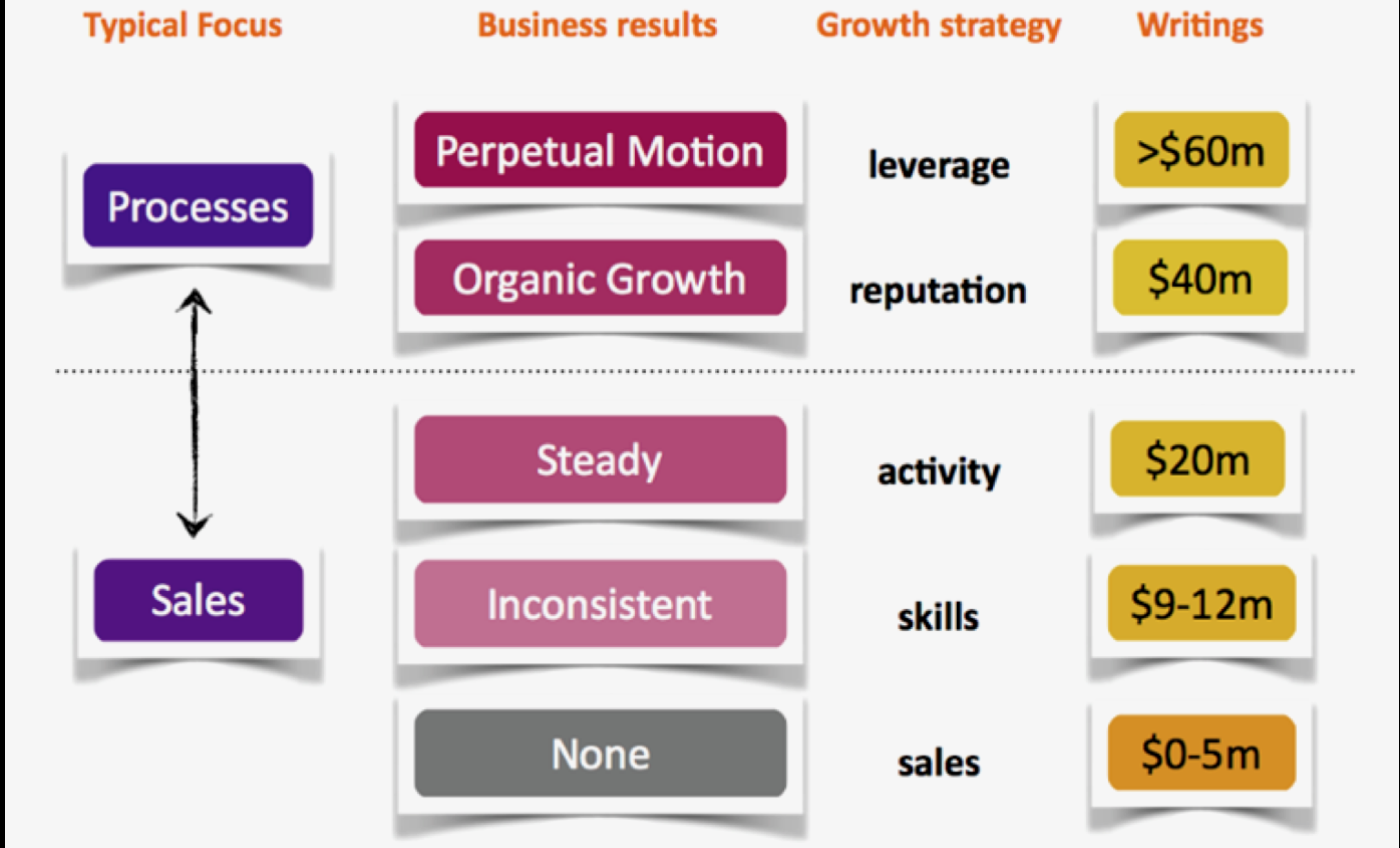
WHAT DOES THE FUTURE HOLD FOR YOU?

We have never been in a more disruptive time in history. Now more than ever you need to be focusing on running an agile business and not just selling loans.

The future will be favourable to those that reimagine the customer experience and what this will look like in 2021 and beyond. How will you adapt to the every changing needs of the market.

Join us now to explore all of these questions and more. Be on the cutting edge of change with Broker Essentials Revolution. Let us help you create the business you always wanted!

Broking Business Results Ladder



YOUR RESULTS ARE YOU CHOICE...

What if we could stack the deck in your favour? What if you had a roadmap that could get you to the destination faster and more efficiently? What would you do? What you take this opportunity?

Broker Essentials Revolution is designed to take you through all aspects of your business, to provide you insights, exposure and the right tools for the right job at the right time. The correct strategy executed at the wrong time or incorrectly won't get you to where you want to go. So lets do this right and together...





Broker Essentials

Exactly What You Get In The Revolution Group

	Value	Silver	Gold	Platinum
<p>1) Revolution Membership: As a Gold or Platinum member, each week you will get direct access to award winning Broker Business Mentor, Jason Back. Every week for the next year, you will be invited to join special workshops covering all aspects of your business and where you will be able to ask Jason any questions you have about your business and get special advice on what to do next. You will have access to a range of other experts in their fields or marketing, credit, HR, sales and much more.</p>	\$22,000	X	✓	✓
<p>2) Revolution Community: When you join the Revolution you will be connected with like minded Brokers who are looking to growth their businesses and are just as passionate about it as you are! To help you stay connected we have created a clients only community group. Here you will be able to ask any question you want, share your experiences, get connected with the best of the best and of course share you wins every week.</p>	\$5,995	✓	✓	✓
<p>3) Broker Essentials Masterclass : To build a highly successful brokerage you need the right fundamentals. This award-winning program will take you through the fundamentals of what's required to scale your business and deliver the sustainable results that you want. With a focus on the three critical paths being Process ,Measure and Client. We will challenge you to reimage what your business can be in 2021 and beyond.</p>	\$997	✓	✓	✓
<p>4) Exclusive Access to our members only website: In addition to the Revolution group you will have access to the Revolution membership platform. Here you will be able to explore, test and learn from resources collected and available to you from all around the world. This resource base will continue to build each week for your exclusive use within your business to help you achieve the results you want. <i>Limited access for Silver members.</i></p>	\$10,000	✓	✓	✓
<p>2) Team access to members Website: As Gold members we don't just want to train you, we want to train your team as well. So we'll give you the ability to have up to 3 different people access to both our Membership site and all the materials. In order to qualify they must be paid staff (not brokers). To activate, simple send us their name, job title and email addresses and our team will give them access.</p>	\$9,995	X	✓	✓



Broker Essentials

Exactly What You Get In The Revolution Group

	Value	Silver Masterclass	Gold Membership	Platinum One on One
6) 90 Day Sprints: Every quarter we will run a special event that will help you maintain your focus. We know you want 'accountability', and this is inherently linked to business success. It's a high-powered session that will provide with the tools, focus and activities to help you create the business you want. These sessions are about action and focuses on the what and the how. But we won't have you working alone! Here we harness the power of the people!	\$5,995	X	✓	✓
7) Strategy Session: Within 2 weeks of becoming a member, you will receive a full hour strategy session. The purpose of this strategy session is to get to know you and discover what you want to achieve. Also, during this session, we will help you decide on your 3 most important next steps. This way you get the focus you need and fast!	\$1,833	X	✓	✓
8) Ongoing Support: As a Platinum member, you'll get ongoing support from our amazing team. If you have any questions or need help with any aspect of your business, you can reach out to use at anytime via phone or email. If it's a simple answer we will help you immediately. However, if it's a little more complicated, you can book a time with us to workshop the problem and get you back on track via our 15 min HIIT sessions.	\$10,000	X	X	✓
9) One on One Mentoring: Do you want to work one on one with Australia's number 1 Broker Business Mentor? If you want to take your learning and accountability to the next level and require a tailored support plan, then this is for you. Not only will you receive all the benefits of the Gold membership but will also receive 14 individual one on one sessions with Jason. The program is a custom-built road map to take your business to the next level. Jason will work one on one with you to help you understand the health of your business and your opportunities for growth.	\$22,000	X	X	✓
	My Total Value (AUD)	\$16,992	\$56,815	\$79,815
SINGLE INVESTMENT & GET 2 MONTHS FREE (Save up to \$1,394) 1 st month payment to be made by credit card with the balanced invoiced. Early Bird offer \$8,364		\$997*	\$9,970	\$22,000
OR.... Early Bird offer only 12 Easy monthly instalments	\$697	n/a	\$997	\$1,833
	My Total Savings	\$15,995	\$50,850	\$57,815

WHY JOIN THE REVOLUTION?

AMIE TENNANT

"As the end of the year is fast approaching I wanted to provide you some valuable insight into how thankful we are to have experienced your workshop. Our team has grown, we have better processes, higher staff satisfaction, our new office is in the making, better work-life-balance, clearer mindsets and the list goes on. So from my entire team at Future Financial Group we are so very thankful, grateful and looking forward to what 2020 will bring".

KARL BOWER

"The Broker Essentials course was the best single day of learning I've completed in my 11 years as a Mortgage Broker. The course delivered practical management and process engineering tips that can be implemented into any business, inside or outside the Broking industry. I recommend it to anyone wanting to grow a professional mortgage business."

ADAM BAKER

I used Jason's coaching service during the COVID-19 period when I was looking for direction with my business. Jason provided me with much more than I bargained for and I have no hesitation in recommending him to other mortgage brokers out there.

STUART DONALDSON

"The day to day struggles, the increasing complexity, and the need to get clear on where to go, how, and how soon are brilliantly dealt with in the Broker Essentials workshop. Forget the theory, this is real, and is the product of a highly successful existing business that has invested in perfecting the art of sales through service excellence. Track down the dates for the next workshops and get on board, this is a must attend for aspiring brokers."

KARL VIOLETA

Within four months of mentoring with Jason, we not only hit that ambitious goal, but we exceeded it, two months in a row. Jason also helped me gain some much-needed work-life balance. I've managed to carve out more quality time with my family and start exercising again. I feel more in control of my workload, my business and my well-being. Jason is an asset to our industry. I highly recommend his coaching and mentoring services for any broker who is looking to improve their business activities, reach their potential and create a business and lifestyle that they love and can be proud of.



OUR PURPOSE

BROKER ESSENTIALS

Broker Essentials was launched in 2016 as a training course for brokers after years of inquiries into the best practices and habits of a high performance business. We now offer a variety of services that include our membership group, one on one mentoring, consulting, keynotes and workshops.

JASON BACK

Jason is the Founder & Director of the multi-award-winning Broker Essentials and is a well known figure in the finance industry with 30 years of experience in finance. Jason is a thought leader and subject matter expert in the mortgage broking industry and was named the Australian Broking Awards 2020 Australian Mentor of Year and Australian Mortgage Awards Industry Service of the year 2020.



Marshall Goldsmith



GOALS & OBJECTIVES

01

To lift the tide of performance for brokers across Australia

02

Provide a practical and targeted program for brokers and administration staff.

03

Create a network of like minded business owners.

04

Work with brokers to create a business by design, leading to their financial freedom.

HOW TO REGISTER

Intakes to the Broker Essentials Revolution Membership are conducted every quarter and are strictly limited. For more information or to register you interest please click here....

[Register now](#)

UNDER THE HOOD!

RESOURCE VAULT



Module: Process

Technology



CRM Integration

Every company today is a software company and, as a result, business and technology ought to be V...



Identifying the ideal client via technology

How can you harness the power of technology to identify and market to your ideal client? Technolo...



Technology App list

Here you will find a list of apps and other technology that we have used, use or have trialed ove...



Technology Roadmap

Your customer's physical and digital touchpoints within your business can highly determine the au...



Broker Essentials Revolution Membership / Categories / Weekly Revolution Sessions / Week 1: The Revolution Begins

Weekly Revolution Sessions 10 Lessons

- 1 Week 1: The Revolution Begins
- 2 Week 2: The 90 Day Cycle
- 3 Week 3: The Client Relationship Roadmap
- 4 Week 4: Resources
- 5 Week 5: The Discovery Call
- 6 Week 6: The Hot Seat - Technology Integration

•Friday Session: Content – Keynotes, interviews and workshops
•Time: 9.30 (90 mins)
•Wednesday: Q&A sessions
•Time: 9 am or 4 pm (30mins)
•Technology Reviews (recorded) TBA

Mark As Complete

Downloads
Week 1: The Revolution Begins - Worksheets

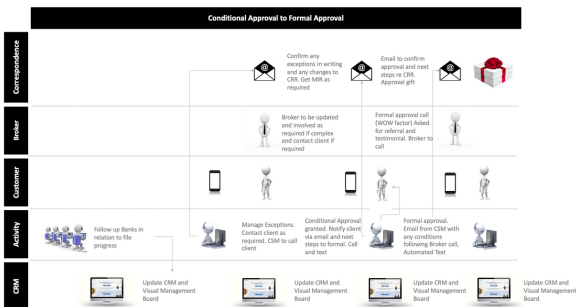
Mark As Complete

Week 5 : The Discovery Call

Weekly Revolution Sessions

With time being so valuable and the cost per file being so high, you cannot afford to be spending too much time with the wrong clients. Let's look at how you can pre-qualify your clients, faster and the better information so you can control who gets to see you.

Broker Essentials End to End Process Map



Operationalise

Scaling your Team

For many small businesses looking to grow their team, the process of getting the right people can...

People Management

People management is defined as a set of practices that encompass the end-to-end processes of tal...

Recruitment

The recruitment process may be one of the most important parts of your business. In fact, I would...

Human Resources : Performance Reviews

REVOLUTION
PROCESS + MEASURE + CLIENT
Feb 2021

150 QUESTIONS ABOUT YOUR MARKETING
Complete your audit now

Building a Broker
Why the foundation of your business is the most important thing you can do

Recruitment Interview Guide

Learn how to get the right candidate the first time.

SALES THROUGH SERVICE EXCELLENCE