

JASON

BACK

Engaging
Thought Provoking
Practical

Keynote Speaker/MC





As a sought after industry speaker, media commentator and award winning business mentor, Jason is lifting the lid on running a best practice brokerage to improve the industry as a whole and support more customers to secure their financial future.

JASON BACK
DIRECTOR



Outstanding job and your involvement added huge value to all brokers. You have been such a pleasure to work with, you made a huge impact considering how passionate you are about the industry. It's great to see that this industry has someone like you on the forefront leading the way and taking brokers to the next level within your own business.

Natasha Burgess Event Coordinator
Momentum Media

Jason thank you for being an integral part of our conference, lots of good feedback regarding your presentation. Your points around remove distraction, Measure everything and accountability factor resonated with a lot of brokers.

Mark Haron
Director Connective

A huge thank you for your efforts with the New Broker Academy, I thoroughly enjoy working with you, being able to bounce ideas and seek advice on anything from content to improving the delivery of the event. I very much appreciate the work you put into ensuring everyone involved was briefed. The advice given to make the speed networking session work well was spot on! Jason you were our highest rated speaker.

New Broker Academy
The Adviser

KEYNOTE 1



SUPERCHARGE YOUR GROWTH: BUILDING A PREDICTABLE PATTERN OF BUSINESS GROWTH

How to grow your broker business without sacrificing time and your sanity, through the core use of three principles of Process, Measure and a Clear Client Journey.

Building a successful brokerage has never been more challenging with over 75% of brokers operating as a sole trader with little to no support.

As a mortgage professional, time is your greatest asset. Imagine if you could get more out of yourself and your team each day?

This Keynote Explores

- Five powerful time management tips
- How to balance your time between sales, customer service, compliance and operations
- Effective prioritisation, task planning and delegation strategies



KEYNOTE 2



FOCUS : HOW MUCH IS YOUR DISTRACTION COSTING YOU?

Understanding the real distractions in the day to day life of a broker. The effective use of time and the value of it. Exploring the Knowing doing Gap, Will Power vs Peer Power and the Accountability Index.

The real value you provide clients is the service and advice, not administration and low value actives. What are you doing now that is costing you time and profit?

We explore the key roadblocks to success.

This Keynote Explores

- Distraction through your environment
- Trust and control
- Planner vs doer
- Stuck in staus quo
- You don't know your worth



KEYNOTE 3



OUTSOURCE THE HEAVY LIFTING : STOP RESISTING

Change in the broker world is not coming, it is already here. Brokers need to evolve as their clients and the environment does. Explore how to maximise efficiency and understand the customer of tomorrow.

This Keynote explores

- Outsourcing
- Offshoring
- Efficiency through technology
- Don't get left behind
- The future consumer

KEYNOTE 4



BUILDING YOUR BUSINESS FOR: MAXIMUM SUCCESS

The key to rapid success is building your broking business the right way, from day one. The right blueprint will ensure a slick and efficient operation that will deliver better client outcomes, faster approvals, bigger volumes and more revenue – in less time. Here, you'll learn first-hand how to build a solid business from day one from one of THE experts in running an elite brokerage.

This Keynote explores

- Set up the systems and processes to ensure you run an efficient brokerage
- Understand what your clients want and how to deliver it
- Identify and capitalise on new opportunities in the market
- Build your business right from day 1
- Create value in your broking business beyond trail

KEYNOTE 5



HOW TO CREATE AN ATTRACTION BUSINESS VIA REFERRALS



The session covers the fundamentals of creating an attraction business to generate more quality referrals that convert. We discuss the key fundamentals of what you are really selling and how to make sure your clients feels safe.

This Keynote explores

- Why we don't ask for referrals
- Creating a memorable customer experience
- Aristotals 5Ws.
- The actions you can take now to increase your referrals tomorrow
- The trust deficit

KEYNOTE 6



PRODUCTIVITY: DOING MORE OF THE RIGHT THINGS



Do you always feel busy but not productive? Are the activities you do every day not leading to the outcomes you want? In this session we will explore what really is productivity and why can feel so overwhelmed and distracted. We discuss why setting goals can be useless unless you have the systems to back them up!

This Keynote explores

- Being Productive over busy
- The six derailers to productivity
- Goal setting and the structures to help you win
- Intentions, Rituals and Addictions
- Why you find it so hard to change!



MASTERCLASS:

Broker Essentials Masterclass designed to cover the fundamentals of running a successful broking business. Whether you're a one-man band in your first year or you run a team of lenders with administration staff, Broker Essentials will create a consistent activity platform from which to accelerate your business growth through service excellence.

This program aims to:

- Accelerate broker and administration staff developments
- Refine technical expertise
- Fast track industry experience
- Bridge the 'hands-on' training gap
- Tighten compliance
- Reduce rework



Process Fundamentals

- Understand the benefit and use of detailed process guides for the end to end client journey
- Ensure Straight Through Processing and a faster time to 'yes'

Measurement Analytics

- Learn what to track in your business and why
- Understand the current state of play for your business and how to achieve your business goals

Client Journey

- Introduce the Client Road map
- Manage client expectations through the loan process and build strong relationships even when things go wrong

WHAT DOES THE AUDIENCE SAY?

"Very valuable and eye-opening presentation for lots of people."

"Presentation by Jason was excellent, information provided was relative to my business. "

"Very well structured information. Clear and concise, direct and valuable. Great presentation – really insightful and relevant. "

"Full of knowledge and confidence. Inspiring. "

"Excellent targeted material, spoke to majority of the room. A lot of expert business management info, not just brokering. "

"Great to hear how good processes can create sound results. "

"Brilliant session, I got a lot out of this one. "

"Excellent presentation. Inspiring
Valuable tips and strategies
Good communicator imparted knowledge well. "

"Great presentation and tips to implement in our business"



WHAT DO HIS CLIENTS SAY?

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 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."

ALYCIA INGLIS

"Excellent course full of practical and useful content, I highly recommend for any broker looking to grow or improve their business. Great value."

BOOK JASON NOW FOR YOUR NEXT EVENT

MELBOURNE BASED

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MFAA/FBAA
APPROVED

MFAA 6.5 CPD hours for Masterclass
FBAA 6.0 CPD hours for Masterclass



Sales through
Service
Excellence

