

VIRTUAL LEARNING SERVICES



Broker Essentials

SALES THROUGH SERVICE EXCELLENCE



YES
we're
online!!!

WEBINARS, COACHING, TRAINING, KEYNOTES

Quality you can trust. Content you can access.

What do you need from a virtual provider?

A qualified expert - The leading mortgage broker coach and trainer, Jason is still your go-to expert in supporting brokers to meet their business goals. Quality content still matters!

Virtual presentation skills - You need pizzazz on a screen so the content pops! Boring just doesn't cut it online (or ever!). As a leading expert in the industry he is known for his highly engaging and educational style.

High-quality production value - We have a professional media room complete with lapel mics, cameras, tripods, box lighting, green screens, the works! No fuzzy screens or muffled audio on our watch.

Technical savvy - 'Is this thing on???' Yikes! You can't afford to have your trainer 'learning in the moment'. Jason has been using virtual facilities for coaching, meetings and trainings for over 10 years.

Engagement options - From break out rooms, to polls, from Q&A to screen shares, from hosted conversations to informal coaching groups, we've got you covered.

Flexible program packages - Want learning options customised for you? We can do that too. And yes we can deliver all our existing programs and services remotely, with minimal changes required.



Jason Back
Mortgage Broking industry expert

Jason is the Founder & Director of Broker Essentials and is a well known figure in the finance industry and sort after media commentator. Jason is a thought leader and subject matter expert in the mortgage broking industry.

In 2016 Jason founded Broker Essentials and launched a training course for brokers after years of inquiries into the best practices and habits of a high performance business. Jason is now available online!

"Knowledge is power. Information is liberating. Education is the premise of progress, in every society, in every family." – Kofi Annan

COACHING

- Individual or small groups
- For individual or team development goals
- As a blended learning solution to support application of learning programs

WEBINARS

- Range of topics to choose from
- Bespoke topics available upon request
- Live interaction and break out rooms available

TRAININGS

- Current training programs available in a virtual environment with minimal customisation needed
- New content to suit a virtual environment can be created on request
- Good video and audio capability at the client site is ideal

TESTIMONIALS

"Great opportunity for Brokers to position their business for a post-COVID environment. Well done Jason Back for helping Brokers use this time productively." - Joel R

"Thank you! You're out there looking after and helping others. Mark Z

"What a great webinar! Thank you for that Jason. Outstanding!" - Teresa H



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New content for new a working environment

Broker Technology you should be using right now.

- Exploring the best tools available to brokers now
- A practical application of these tools
- We break down the end to end customer journey

A Business Blueprint for Brokers in a Crisis

- The 8 areas of focus for your business in a crisis
- The dealers in your business in a time of change
- We are unprecedented times, what are you going to do?

The Future of Broking and how to Pivot

- What does the future hold for mortgage broking?
- Why and how you can pivot your business and thinking
- If not now when?

Broker leadership in a crisis

- How to manage your team and your clients in a crisis
- How do I motivate people differently online?
- How do I keep my team together?

Building your business for maximum success from day 1

- Setting up the systems and processes for efficiency
- Understand what your client wants and how to deliver
- Creating value to your business beyond trail

Client favourites

How to super charge your business

- Five powerful time management tips
- How to balance your time between sales, customer service, compliance and operations

Broker Productivity

- Being productive over busy
- The six derailers to productivity
- Goal setting and the structures to help you win

How to maintain focus when distraction is all around

- We explore distraction in your environment
- Trust and control and planner vs doer behaviours
- What happens when you are stuck in the status quo

How to create an attraction business via referrals

- Why don't we ask for referrals
- Creating a memorable customer experience
- The 5Ws

**"Education is the passport to the future,
for tomorrow belongs to those who
prepare for it today."
- Malcom X**