



COURSE CATALOG

October 2023

The Mortgage Collaborative University

Harnessing the power of the TMC network to craft exceptional learning experiences that cultivate the most crucial professional skills in the mortgage industry today.





Strategic Communication For Mortgage Professionals

Virtual & Online | Instructor-led | 1-Week | 10 Hrs.

\$295

TMC Member Price

Learn and apply a proven communication process rooted in empathy and inclusivity, tailored to today's technological and mortgage landscape, that will equip you to convey business-critical information and ideas with unparalleled effectiveness.

Course Objectives

- Utilize the 5 Steps of Effective Listening
- Identify communication styles different from your own and adapt as needed to enhance results
- Consistently apply the 6 Steps to Forming a Strategic Message in daily work routine
- Successfully navigate tough conversations by following the 4-step process
- Craft messages (verbal/written) that motivate, resonate, educate, and persuade others
- Select the best communication channels for impact and results

Target Audience

Managers, Team Leads, Aspiring Leaders, & Individual Contributors

Assignments

1. Complete a Communication Styles assessment to establish communication style awareness
2. Apply the 5 Steps to Effective Listening to a real-life work scenario and assess outcomes
3. Evaluate your manager and co-workers' primary communication styles & describe how you'll adjust to ensure better collaboration and fewer misunderstandings

Schedule

| WEEK 1 | | | |
|--------|---|---|--|
| MON | Virtual Zoom Meeting 1 Course Introduction (30 min) | Module 1 - Course Overview (30 min/self-paced) | Module 2: The Communication Process (30 min/self-paced) |
| TUE | Module 3: 5 Steps to Effective Listening (60 min/self-paced) | Module 4: Communication Styles (90 min/self-paced) Upload Module 3 Assignment to TMCU Portal | |
| WED | Virtual Zoom Meeting 2 Review Modules 1-4 (30 min) | Module 5: Forming Strategic Messages (60 min/self-paced) Upload Module 5 Assignment to TMCU Portal | |
| THU | Module 6: Message Channels (60 min/self-paced) | Module 7: Putting It All Together (60 min/self-paced) | |
| FRI | Virtual Zoom Meeting 3 Review Modules 5-7 (30 min) | <ul style="list-style-type: none"> • Pass Comprehensive Knowledge Check (80%) • Complete Course Evaluation • Obtain Completion Certificate | |

Send questions to TMCUniversity@mtgcoop.com



Strategic Business Development For Mortgage Professionals

Virtual & Online | Instructor-led | 1-Week | 12 Hrs.

\$395

TMC Member Price

Tailor-made by a team of seasoned education and mortgage experts, this course is designed to help you overcome obstacles, supercharge your prospecting efforts, and unleash your full sales potential. Learn how to bust through sales barriers, develop and maximize lead generation sources, evaluate and implement a marketing plan, and create a strategic business plan unique to your sales strengths.

Course Objectives

- Identify your sales strengths and weaknesses
- Take action to overcome sales barriers using scientifically verified countermeasures
- Implement effective lead generation strategies: increase referral partner leads, develop and nurture a book of business, expand your network, and successfully convert prospects to borrowers
- Apply the Agent 5 Meeting Strategy framework to boost your real estate agent meeting results
- Implement a metrics-based marketing strategy that scales with your business
- Create a customized business plan that directs your pathway to sales success

Target Audience Sales Managers & Loan Officers

Assignments

1. Take a transformative online sales assessment to identify your unique sales strengths and how to overcome barriers, supported by scientific evidence
2. Demonstrate your ROI calculation skills for sales and marketing efforts
3. Complete a comprehensive business plan that helps you articulate your intrinsic motivations, conduct a SWOT analysis, overcome sales barriers, and define your prospecting, production, and income objectives, all in alignment with your unique sales strengths

Schedule

| WEEK 1 | | | |
|--------|--|---|---|
| MON | Virtual Zoom Meeting 1 Course Introduction (30 min) | Complete Online Sales Assessment (60 min/self-paced) | |
| TUE | Virtual Zoom Meeting 2 Discuss and Analyze Sales Assessment Results (60 min) | Module 1: Sales Barriers & Countermeasures (60 min/self-paced) | |
| WED | Virtual Zoom Meeting 3 Module 1 Review & Intro of Modules 2-5 (30 min) | Module 2: Business Planning Part I Upload Assignment 1: Define Your Why & Time Value Exercise (60 min/self-paced) | |
| THU | Module 3: Developing Business Sources (60 min/self-paced) | Module 4: Business Planning Part II Upload Assignment 2: Completed Business Plan (60 min/self-paced) | |
| FRI | Virtual Zoom Meeting 4 Course Conclusion (30 min) | Module 5: Putting It All Together & Sticking to Your Goals (60 min/self-paced) | <ul style="list-style-type: none"> • Pass Comprehensive Knowledge Check (80%) • Complete Course Evaluation • Obtain Completion Certificate |



Strategic Leadership For Mortgage Professionals

Virtual & Online | Instructor-led | 2-Weeks | 10 Hrs.

\$595

TMC Member Price

Unlock your leadership potential and learn to navigate business and team dynamics with confidence and impact. Discover your unique leadership strengths and learn how to apply proven methods for evaluating your team, coaching employees, listening and communicating with empathy, crafting a strategic plan, and achieving your goals.

Course Objectives

- Understand your natural leadership strengths through scientific assessment
- Accurately identify leadership and work styles
- Implement best practices for managing a multigenerational workforce
- Apply an empirical process for team evaluation, gap analysis, and corrective actions
- Improve your communication and listening skills for greater impact
- Differentiate between coaching and teaching
- Employ empathy-based coaching techniques
- Leverage your unique strengths, instincts, and preferred problem-solving methods to create an actionable and goal-based strategic plan

Target Audience

Aspiring Managers, Team Leads, & Managers

Assignments

1. Using real examples, evaluate the strengths and weaknesses of your preferred leadership style
2. Build a foundation of communication styles awareness by completing a Survey of Communication Styles assessment
3. Assess your team based on the 6 Foundational Characteristics of high-performing teams
4. Follow the 4-step process for conducting a team gap analysis
5. Define key steps and benefits for the GROW coaching model
6. Complete a comprehensive business plan that clearly defines what your business goals are and how you'll achieve them, while in alignment with your unique strengths and instincts

Schedule - see next page

Send questions to TMCUniversity@mtgcoop.com



| WEEK 1 | | |
|---|---|---|
| MON | Virtual Zoom Meeting 1 Course Introduction (30 min) | Complete Leadership Assessment & Analyze Results This short online assessment helps you to discover the instinctive ways you take action, approach problems, and strive for goals. (60 min/self-paced) |
| TUE | Module 1: Leadership Style & Strengths Identify your leadership strengths and how to best apply and adapt them to business and team dynamics. (60 min/self-paced) | |
| WED | Upload Module 1 Assignment to TMCU Online Portal* | |
| THU | Virtual Zoom Meeting 2 Review Module 1 & Intro Modules 2-4 (30 min) | Module 2: Team Evaluation Discover and apply an empirical framework designed to analyze and correct gaps between current and desired performance. (60 min/self-paced) |
| FRI | Upload Module 2 Assignment to TMCU Online Portal* | |
| WEEK 2 | | |
| MON | Module 3: Effective Communication & Active Listening Identify your primary communication style and learn how to quickly recognize and adapt to the styles of others. Learn to implement a proven and measurable communication plan. (60 min/self-paced) | Upload Module 3 Assignment to TMCU Online Portal* |
| TUE | Module 4: Effective Coaching Explore and practice a proven process for coaching team members through challenges and growth. (60 min/self-paced) | |
| WED | Virtual Zoom Meeting 3 Review Modules 2-4 & Intro Module 5 (30 min) | Upload Module 4 Assignment to TMCU Online Portal* |
| THU | Module 5: Strategic Planning Create a business plan that leverages your innate strengths, instincts, and preferred problem-solving methods to accomplish your goals. (60 min/self-paced) | |
| FRI | Virtual Zoom Meeting 4 Review & Conclusion (30 min) | <ul style="list-style-type: none"> • Upload Module 5 Assignment to TMCU Portal* • Pass (80%) Comprehensive Knowledge Check • Complete Course Evaluation • Obtain Completion Certificate |
| *Instructor evaluation & feedback provided within 2 business days | | |



Mini Courses



Energize to Optimize: Your Ultimate Time Management Course

\$100

TMC Member Price

Online | Self-Paced | Instructor Guidance & Feedback | 2 Hrs.

Learn the art of prioritization, resource allocation, and how to harness your peak energy for optimal performance. Gain profound insights by systematically assessing your time and energy investments, and current work routines to uncover patterns that either enhance or hinder productivity. Leave the course equipped with a comprehensive and detailed action plan perfectly aligned with your business goals.



Loan Officer Success Blueprint: Crafting Your 2024 Business Plan

\$100

TMC Member Price

Online | Self-Paced | Instructor Guidance & Feedback | 2 Hrs.

Learn to craft inspiring and measurable goals aligned with your aspirations for a transformative year ahead. Follow a proven framework to break down your goals into actionable steps and prioritize tasks with strategic action planning. Set your plan up for success by employing practical tools and proven methods to track goal progress, stay motivated, and leverage your accountability and support systems.



How to Effectively Navigate Borrower & Referral Partner Objections

\$100

TMC Member Price

Online | Self-Paced | Instructor Guidance & Feedback | 2 Hrs.

Discover the power of empathetic listening and authentic communication to ascertain the needs of your borrowers and referral partners on a deeper level. Learn to decode objections and how to respond mindfully, composed, and solution oriented.

Bonus Mini Courses

- **How to Make Better Business Decisions**
- **Improve Your Business Writing Skills**
- **5-Day Challenge to Improve Your Mental Health**

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