

Wholesale Mortgage Sales Manager Transforms His Recruiting Into Success

As a producing sales manager, Matt Coles knows what turns off busy account executives like him. What he didn't know was how to get their attention. Model Match helped him uncover the right strategy to get on the radar of the industry pros he's looking to join his team.

Lackluster Recruiting Falls On Deaf Ears

Matt Coles has been managing Plaza Home Mortgage, Inc. wholesale sales operations for Los Angeles, Las Vegas, Utah and Arizona for the past four years. Although he was on track production-wise, he set a goal to increase recruitment and add sales talent.

Playing Kick-the-Can With Poor Results

Until he began working with the Success Coaches at Model Match, Matt's recruiting process was haphazard.

"I consistently kicked the can down the road and never put time and effort into recruiting."

He struggled to stay in touch with prospects even though he realizes that recruiting is a long haul game. "Before I would make one call, get rejected and never follow up again."

"In the past, because I wasn't confident in my ability to do it, I just never put recruiting on my calendar. And my calendar kinda runs my week."

His inconsistent process found him occasionally scouring LinkedIn for a good prospect then sending a blind email, or calling someone that he'd met at a trade show.

"There was no structure. There was no strategy. There was no end game in place."

CUSTOMER SPOTLIGHT

Matt Coles
Plaza Home Mortgage
Sales Manager
California, Nevada,
Arizona and Utah





Plaza Home Mortgage

Plaza is the nation's fifth largest wholesale mortgage firm with over 800 employees nationwide.

To schedule a personalized demo of Model Match, contact us at (949) 344-2780.

A Custom Solution Lets The Calendar Call The Shots

Model Match configured the platform to respond to Matt's unique needs as wholesale mortgage executive. Although it's early days yet, he has been so enthusiastic about the results he's already experiencing that his regional manager has expressed interest in extending access to the platform to other locations.

He credits the Success Coaching he's received through Model with helping him "to correctly reach out to account executives" and to constantly stay top of mind with the industry pros that he's targeting. "Now when I'm in Model Match and I schedule an appointment, put a phone call in or an email in, it pops up on my calendar."

"The biggest benefit of Model Match is the structure. Your weeks and your days tend to get away from you. And then all of a sudden you look and you haven't done an active recruiting phone call in 3 weeks. Model Match doesn't let that happen. It's on my calendar. It's in my face."

Matt applauds the fact that Model Match makes it impossible for him to skirt accountability.

"The first thing you see is a productivity number. And as a competitor and a producing sales manager, when I see a 3 out of 10 on productivity I'm clearly not doing my job . . . And that's what I needed. I needed structure and I needed to be held accountable for recruiting efforts. And that's what this does. That's what this solution brings."