

## Model Match Success Coaching Helps A Reluctant Manager Embrace Cold-Calling

Successful branch managers know that recruiting often involves cold calling loan officers. But knowing that you need to cold call prospects, and actually picking up the phone (much less knowing what to say), are completely different realities.

### Living the Cold-Calling Blues

Phil and Troy Williams are a father and son team who recently partnered up to open a new Skyline branch in Thousand Oaks, California. While Phil is an experienced pro, Troy is a novice recruiter and felt daunted by the need to cold-call prospects. “I didn’t even know where to start in all honesty.”

### Leaving Behind Post-It Hell

When Skyline offered the Model Match platform to all their branches, the Thousand Oaks branch immediately signed up. Phil and Troy were so enthusiastic about finally organizing their recruiting workflow that they started using Model Match even before they opened their new branch.

*“We’d been using Outlook and sticky notes and note pads, hoping that we knew where they all were. This led to too many situations where we were searching for notes to help jog our memories of the last conversation we had with someone. There was no flow, no structured follow through.”*

Model Match gave them “a simple, straightforward way to schedule tasks with reminders” as well as a place to collect notes logging their conversations in one place making “it a lot easier to prepare for a follow-up phone call.”

### CUSTOMER SPOTLIGHT



**Phil Williams**  
Skyline Branch Manager  
Thousand Oaks, CA



**Troy Williams**  
Skyline Branch Manager  
Thousand Oaks, CA



#### Skyline Home Loans

Skyline is a full-service direct lender with over 30 branches located nationwide.

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## Learning From The Best Instead Of Reinventing The Wheel

While they appreciated finally having a tool to keep all their information organized, Troy and Phil pointed out that investing in biweekly 1-on-1 coaching calls with Model Match Success Coaches has paid off.

*"I've asked him specific questions about cold recruiting, about how to approach someone we did not know and with whom we did not have a warm connection. Having Steve on the coaching side giving us pointers on getting the system set up, walking us through it, but then also sharing his decades of recruiting experiences with scripts, and follow-up ideas and cold-calling approaches, it's been an awesome, awesome learning experience for myself and Phil."*

Phil and Troy now maintain a regular recruiting cadence, calling prospects twice a week on Tuesdays and Thursdays. Phil has taken advantage of Model Match's 1-on-1 Success Coaching to learn a variety of cold-calling approaches and effective follow-up techniques. They also use Model Match's drip emails to stay top of mind.

*"Model Match allowed us to gain traction in a much more structured manner. We know what to expect, what's coming up. We know, with a prospect, the various phases where somebody might be in. Overall, we have a better idea of where the future of our business is going to come from and when."*

### Overall Impressions

*"Their customer service is beyond what I've experienced from most companies."*

*"I think it's a phenomenal tool that's designed specifically for our industry which is what's key about it. It's not a general software or application that we're trying to adapt to a different use."*