



Experienced Recruiter Says Goodbye to Stupid Spreadsheets

Recruiters for the mortgage lending industry navigate a challenging and competitive environment, one where attracting the right folks to join your team requires agile thinking and a deep dose of patience.

The Search For the Right Organizational Tool

Mary Ann Arbogast is one of several full-time recruiters for Loan Simple. While she's based near Seattle, Mary Ann recruits nationwide, looking for loan officers and branch managers who will thrive within Loan Simple's entrepreneurial culture.

As someone who has recruited for several different companies over the years, Mary Ann has employed a variety of tools to organize her recruiting activities, from spreadsheets to custom databases. Some of those tools made her job more difficult than they should have. One tool used by a previous employer was based off Encompass. "It was a joke," she explained. Her company used it as a way to "keep track of employees instead of helping you keep track of your work."

After she made the move to Loan Simple, she used Microsoft Excel as a daily log to track her recruiting efforts. And while Excel is a familiar tool, she admits she was relieved to leave it behind.

"I enjoy being able to track things and track successes and not having to keep up with a stupid Excel spreadsheet."

A Long Recruiting Cycle Meets Its Match

Recruiting is a process, not an event. As a veteran industry recruiter, Mary Ann is familiar with the complex process of cultivating long-term relationships with multiple prospects.

"You can end up talking with somebody for two years before they ever make the move."

CUSTOMER SPOTLIGHT

Mary Ann Arbogast
Loan Simple Vice President,
Branch Development
Seattle, Washington





Loan Simple

Loan Simple is a direct lender in 27 states with multiple users on Model Match.

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But the good news is that Mary Ann has already been able to hire a number of new employees since adopting the Model Match platform, allowing her to experience the full breath of the system's capabilities.

"I had one guy from a two-man branch that just came on last week when everything was approved with the licenses and the state that I started talking to last August/September. . . I think Model Match is a great system. I like that I can now upload my documents for corporate review when I'm asking for someone to be considered for hire."

Model Match's built-in drip marketing is also allowing Mary Ann to stay in touch with prospects she believes have a high probability of signing on with Loan Simple. The emails have proven to be a big hit.

"I actually have one gentleman that was pretty close last year but still hesitant. And every single month I know like clockwork when he gets it because he will send me an email saying 'Hey girl! How's it going? Content's great on this one. Look at you go! Or something similar.' So it's keeping me engaged with them without any effort on my part."

Brainstorming with Industry Pros

Mary Ann's deep knowledge of the industry is a huge asset. That said, she's more than happy to take advantage of Model Match's 1-on-1 coaching to stay at the top of her game.

"It's nice to get some observations or techniques from somebody different. It's always a learning experience . . . My Success Coach is such an enjoyable person that I look forward to our every other week conversations. Even if it's a 'Hey, what's going on in your end of the world?' kind of thing."

She credits her Success Coach with helping her get comfortable with expanding the ways she stays in contact with her prospects.

"I've been in this business since 1979. I would never text somebody that I'm having conversations with unless they texted me. You know what I mean? But my coach was like, 'No text is good.' So I've gotten into using that. You know, I text with my adult daughter why wouldn't I text with somebody that I'm having conversations with?"