

FACT SHEET

Professional Development Session

The Lifetime Value of Your Clients



The National Finance Institute



This professional development session must be combined with others to create a customised half-day session.

What does the course cover?

This one hour session will teach you how much a client is actually worth to your mortgage business over their lifetime. You will prove to yourself that it is more cost-effective to serve your existing clients better than trying to generate a continuous stream of new clients.

By calculating the lifetime value of your clients you will gain an appreciation of their significant 'profit value' to your business. We think you'll be very surprised!

The session is packed with powerful examples and practical strategies to gain more business from your existing client base, with less hassles and resulting in more profit.

We all hear about the importance of repeat and referral business, but this session will provide strategies for making them impact on your bottom line.

- You'll learn why it might not be such a bad idea to 'buy' clients
- How to use trail commission to build client loyalty
- Realise the importance of generating repeat business
- How to calculate the profit that lies dormant in your business.

Are there any CPD points available for this session?

This session has been designed to contribute toward the Mortgage Industry Association of Australia's (MIAA) continuing professional development (CPD) requirements. The CPD points allocated, for each session may vary according to the level of technical knowledge involved. As an indication, mortgage industry related educational workshops are allocated 3 points per day or 1.5 points per session.

However, these courses shouldn't be considered a 'point accumulation exercise', but rather a means to create a competitive edge over your rivals.

What happens if I attend, but don't gain any benefit?

If you attend an NFI professional development course and for any reason it does not prove to be an experience that can help you establish, or greatly improve, your career as a mortgage professional, you will receive a 100% refund upon request at the completion of the course. We make this guarantee because we believe 100% in the results our courses deliver.

Who has this session been developed for?

This session has been developed for new and experienced mortgage brokers. It is also particularly relevant to managers and support staff of aggregation, franchise and other large mortgage companies.

How long will this course take to complete?

This session is one hour duration. It is to be combined with other available sessions to make a half-day training course.

When are the courses scheduled?

Courses can be conducted to suit your schedule. We can arrange a venue or it can be held at your training room. We require 20 participants to conduct a course.

What materials/equipment do I need?

A workbook is supplied at the commencement of the course. You only need to bring a pen.

How much does a professional development course cost?

Prices range from \$115 to \$225 per person.

What will I receive?

You will receive a course workbook and Certificate of Attendance.

When does the course start and finish each day?

Courses generally start at either 9am or 1pm, depending on the time constraints of the group.

What should I wear to the training and what is the arrangement for lunch?

Smart casual is expected as a minimum dress standard by all students. You are responsible for organising your own lunch unless notified otherwise.

How do I arrange a course?

Please call Client Services on 1300 765 400 – we'd be delighted to hear from you.

Phone:
1300 765 400

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07 3822 6003

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Version 220904