



Core7 Referral System

Application

Core7 Application

NAME:

COMPANY:

EMAIL ADDRESS:

PHONE:

With respect to each profession please rate your relationship with all:

- 0: I DO NOT HAVE A RELATIONSHIP
- 1-4: I am not satisfied with my current relationship
- 5-6: I have a relationship, and would be willing to consider working with someone else
- 7-8: I'm satisfied and would not consider working with anyone else
- 9-10: I have a true partner

Property & Casualty Insurance Agent: _____

Real Estate Agent: _____

Financial Advisor: _____

Real Estate Attorney/Escrow Officer: _____

Estate Planning Attorney: _____

Accountant: _____

Mortgage Originator: _____

How do you think you can help each of the following group members become increasingly successful?

Property & Casualty Insurance Agent:

Mortgage Originator:

Real Estate Agent:

Financial Advisor:

Accountant:

Estate Planning Attorney:

Real Estate Attorney/Escrow Officer:

How many clients do you speak with per month?

What are currently your most successful marketing activities?

Where does most of your business come from?

What fears or concerns do you have relating to being in this group?

Do you maintain a database?

How many contacts are in your database and what database management system do you use?

What do you do to stay in touch with your database? Please check all that apply:

- Mailings
- Email
- Phone Calls
- Face to Face Meetings
- Annual/Periodic Reviews

If you had an issue with a group member, how would you handle it?

If you're losing faith in a team member what would you do?

How often do you stay in touch with your database?

Please write a little about your business plan for this year?

Describe your process from start to finish when you are first meeting with a client?



Core7 Referral System Information Package

THE CORE7 PYRAMID

Qualities of a Core7 Professional



What is Core7?

Core7 is a Referral System based on structured Mastermind Groups. These groups produce predictable systematic referrals that each professional is accountable for. The best part is that the System is all for the benefits of the client/consumer.

These Groups are Exclusive and Focused ONLY on the Core7 Professionals:

- Property & Casualty Insurance Agent
- Mortgage Originator
- Real Estate Agent
- Financial Advisor
- Accountant
- Estate Planning Attorney
- Real Estate Attorney/Escrow Officer

How does it work?

- Online Courses
- 1 on 1 Meetings
- Online Accountability Reminders
- Referral Tracking Mechanisms

Next Steps

1. Fill out the Core7 Referral System application.
2. Your application will be evaluated your C7 Group Leadership with guidance from the Core7 Leadership.
3. Purchase Core7 to learn the system, receive reminders, assignments and lessons.
4. Start attending meetings and learning the system.
5. Execute the System.
6. Enjoy a new way of doing business!

INDIVIDUAL COMMITMENT

If you commit to the following, you will be a successful C7 team member:

1. Be willing to create a predictable system to ensure accountability to members of the group.
2. Be willing to do joint marketing campaigns with my Core7 Partners should the group collectively decide this is a good idea.
3. Be willing to create and establish trust with every member of the group.
4. Be willing to set a realistic goal for a certain number of referrals per month that will be tracked.
5. Be willing and prepared to follow the meeting agenda each week and have the lead tracker filled out before the meeting.
6. Be willing to follow a predictable system to ensure accountability to key members of the group.
7. Above all else, prioritize first and foremost **the needs of the client**.

REQUEST AN APPLICATION TO JOIN CORE7

If you are interested in being an exclusive professional in our Mastermind Group, please submit a request for a Core7 Application.