



WHAT IS YOUR ROLE?

FINDER (CEO)

- RAINMAKER
- GATEKEEPER
- BUSINESS DEVELOPMENT OFFICER



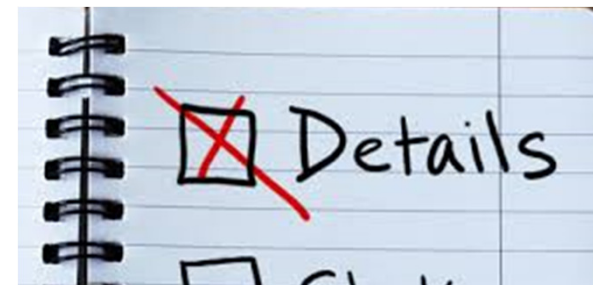
MINDER (COO)

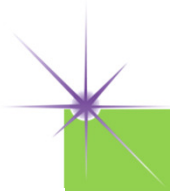
- PROCESS/OPERATIONS
- TRANSACTION FLOW
- CUSTOMER SERVICE



GRINDER (CFO)

- BUDGET MANAGEMENT
- ADMINISTRATIVE DUTIES
- MINIMUM WAGES ACTIVITIES





Pro-Active IGA FINDER	Customer Service MINDER	Administrative Tasks GRINDER
1 st & 10s	Eat that Frog	Planning & Review
Presentations/Classes	Client communication	Database management
Client/partner visits	Transaction management	Thank you notes
Business meetings	Marketing	Continuing education
Client meetings	Loan analysis	Sales meetings
Networking	Post closing follow up	Budgeting

INTENSITY & FOCUS VS LONG HOURS