

## Strategic Communication

● For Mortgage Professionals ●

Effective

Start

Elevating your team’s communication skills is one of the most advantageous investments you can make as a leader. Most mortgage professionals are effective communicators and for the past few years, that was enough. However, today’s lending environment leaves little margin for error when it comes to sourcing, satisfying, and retaining customers.



**MOST MORTGAGE CUSTOMERS** reported that an exceptional customer experience is almost as critical as getting the best rate<sup>1</sup>.

When markets shift and opportunities decrease, business leaders tend to focus on strategic planning for cost saving, staffing, products/services, processes, and technology. All of which are critical elements of business success; however, improving communication is often overlooked as a strategic organizational goal.

**86%**

of employees and executives cite the lack of **effective communication** as the main causes for workplace failures<sup>2</sup>



In an industry where much of what happens is out of your control, how and when your teams communicate internally and externally, which are within your control, should be finely honed as a **competitive advantage**.

**And that’s where TMCU comes in.** This course is designed specifically for the TMC network and based on the needs expressed by some of the top mortgage executives and professionals in the TMC family.

You told us what you needed,  
and we built a curriculum around it.

### TARGET AUDIENCE

This course is designed specifically for mortgage professionals in the TMC network and well-suited for sales and operations team members that include:



Individual Contributors



Team Leaders



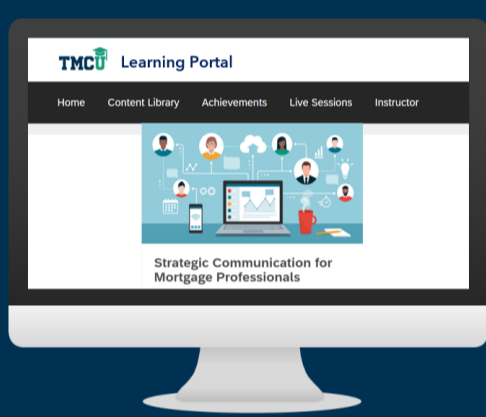
Aspiring Leaders



Managers



### FORMAT



Participants will access the course in our online **TMCU Learning Portal**. The course features include:

- Instructor guided format
- Relevant, interactive, & engaging content
- Discussion boards & social learning
- Activity-driven learning with accountability
- Course completion time is approximately 8-10 hours over the course of a week

### COURSE COMPONENTS



**Communication Process:** Proven communication framework updated for today’s technology and mortgage environment.



**Active Listening:** Tips for listening to understand with empathy.



**Communication Styles:** Learn to quickly recognize styles of others and tailor communication for better results.



**Forming the Message:** Craft timely messages and difficult conversations that motivate, resonate, educate, and/or persuade customers, co-workers, stakeholders, and more.



**Communication Channels:** Choose the most effective channel(s) for the message and recipient to maximize desired results. The communication channels discussed in this course include:

Email | Phone | Face-to-face | Text | Virtual | Social



**85%**

of employees use more than one communication device to communicate at work<sup>3</sup>

**3+**

As many as 32% use 3 or more devices because they value flexibility<sup>3</sup>

#### Bonus Modules:

**Microsoft Teams Overview & Best Practices:** 30 min instructor-led webinar

**Outlook Efficiency Tips:** 30 min instructor-led webinar

### BUSINESS OUTCOMES

The ultimate success of any training investment should be measured by the **results** it delivers to your business. While many courses focus on what the participant will **KNOW** after completing the course, we focus on what they will **DO** after the course.



We will provide the participant’s manager with a short evaluation guide they can use to **measure** the **effectiveness** of the course by observing measurable improvements in some or all the following key behaviors. After completing the course, the participant:

- ✓ Adjusts their communication style (as needed) for message recipients
- ✓ Uses appropriate communication channel(s) for message type
- ✓ Reduces, eliminates, and/or de-escalates unproductive email chains
- ✓ Communicates their ideas clearly and concisely in writing
- ✓ Demonstrates empathetic listening and feedback
- ✓ Selects a proof buddy for written communications

Finish

Strategic

Sources

1. McKinsey & Company: [Competing on Customer Experience in US Mortgage](#)
2. Expert Market: [The Importance of Effective Workplace Communication – Statistics for 2022](#)
3. Pumble: [Workplace Communication Statistics 2021](#)