



## MORTGAGE BROKER

**Summary: Transition from being stressed in the business to being focused on the Business**

**The Client/Sector:** Financial, Mortgage Broker

**The Goals:**

The owner wanted to grow the business in a structured and sustained way. They wanted to increase sales revenue, diversify the product portfolio and balance market mix between private and commercial clients.

**Business in Profile:**

The business is focused on providing domestic and commercial mortgages to clients, with the occasional up sell of add on products. Independence is maintained through a whole of market approach. The business had been in existence for 3 plus years with the business owner having been in the industry several years longer. The bulk of the business was based on business networking and referrals, which wasn't that steady. They felt like they were going backwards to go forwards a lot of the time.

**The Strategies:**

The owner, a lady, needed to get in control. We helped her organise her office, her day and her team. Then we developed some specific systems and procedures that made sure that things weren't being done twice or not at all with the result that all staff could ably serve a client.

Thus freeing up the advisors time – to quote and to advise. Her capacity as advisor doubled, making her more profitable and paving the way to take on a new advisor in due course and growing the company. She now knows exactly where the business is on weekly basis and has a clear view of marketing, sales, average income per client group and cash flow.

All revenue streams are performance driven and exploited. Business growth is no longer opportunistic but by design. Networking and referrals now have structure and produce results in a consistent way. They now know where they are going and even know how they are going to get there

**The Outcome:**

Being in control has helped this business owners make better use of her time. She has a clear view of where the growth will be coming from and what exactly she needs to get her staff to do to make it happen. She is now in control of her business and has realised just how confident she has become at being a business owner. She now sleeps at night even in a currently volatile market (the credit crunch). They are now able to effectively market and sell to new and existing markets using methodologies and strategies supplied by ICON. Turnover has doubled and profits have improved. Her progress was acknowledged when she was the runner up for Entrepreneur of the Year Award at the Midlands Business Awards 07

**Quote,** " We should have started sooner as we would have had less stress, more business and bigger profits. But really glad we did " "

Icon Business Solutions Advisors improve business' owners lives by providing step by step solutions where the business owner gets to design and implement specific business strategies to achieve financial and personal gain.



**Our Results  
Your Success**