

Loan Officers- 3-5 loans per month

Active accounts Accounts = Average 3 loans per month over the most recent quarter

Account Ranking = 1-50 of current accounts

Prospects = People you want to start referring you business

Accounts Pyramid

Loan Officer's

1.	6.
2.	7.
3.	8.
4.	9.
5.	10.

Accounts

1.	6.	11.	16.	21.
2.	7.	12.	17.	22.
3.	8.	13.	18.	23.
4.	9.	14.	19.	24.
5.	10.	15.	20.	25.

Top 50

1.	8.	15.	23.	30.	37.	44.
2.	9.	16.	24.	31.	38.	45.
3.	10.	17.	25.	32.	39.	46.
4.	11.	18.	26.	33.	40.	47.
5.	12.	19.	27.	34.	41.	48.
6.	13.	20.	28.	35.	42.	49.
7.	14.	22.	29.	36.	43.	50.

Prospects

1.	6.	11.	16.	21.	26.	31.	36.	41.	46.
2.	7.	12.	17.	22.	27.	32.	37.	42.	47.
3.	8.	13.	18.	23.	28.	33.	38.	43.	48.
4.	9.	14.	19.	24.	29.	34.	39.	44.	49.
5.	10.	15.	20.	25.	30.	35.	40.	45.	50.

Goals for the Pyramid

Target our key relationships. Focus on each person and what they need. Take great care of them.

With PROSPECTS, have a great interview (questionnaire).

With Top 50 and ACCOUNTS, have great systems to take care of them and the leads they refer to your team. Your goal is to take each name UP the pyramid. Eventually, your pyramid will be top heavy.

Always remember that Prospects are a renewable resource.

