got mortgages?

AI MYTHS vs. EXECUTION

HOW I ACTUALLY USE AI

REAL WORK. MORE IMPACT.

MEETINGS.
BLOGS.
CONTENT.
CLIENTS.
TEAM.
FOLLOW-UP.

AI CONNECTS THE WORK I'M ALREADY DOING.

AI IS THE ANALYST.
I'M STILL THE ADVISOR.

P R O V E

PREPARE SMARTER	REPURPOSE YOUR VOICE	ORGANIZE EXECUTION	VISIBILITY OVER ABILITY	ENGAGE AUTHENTICALLY

ONE CONNECTED WORKFLOW.

PREPARE SMARTER

TURN MARKET NOISE INTO INSIGHT.

REMEMBER
Research once. Use it five ways.

EXECUTE
Create today's market take.

REPURPOSE YOUR VOICE

ONE CONVERSATION. MANY OUTPUTS.

REMEMBER
Your voice multiplies.

EXECUTE
Turn one idea into 5+ assets.

ORGANIZE EXECUTION

DON'T LET CONVERSATIONS DIE.

REMEMBER
Every meeting should create a next step.

EXECUTE
Use AI for recaps and follow-ups today.

VISIBILITY OVER ABILITY

SHOW UP WITH USEFUL EDUCATION.

REMEMBER
Helpful content builds trust and business.

EXECUTE
Publish one piece this week.

ENGAGE AUTHENTICALLY

FROM COMPLEX TO CLEAR.

REMEMBER
People remember how you make them feel.

EXECUTE
Use AI to draft. You make it real.

Execution Beats Theory.

P PREPARE SMARTER
R REPURPOSE YOUR VOICE
O ORGANIZE EXECUTION
V VISIBILITY OVER ABILITY
E ENGAGE AUTHENTICALLY

FIVE WAYS WE PUT AI TO WORK

ONE CONNECTED SYSTEM.

P

PREPARE SMARTER

Research + market intelligence

R

REPURPOSE YOUR VOICE

Content from work already done

O

ORGANIZE EXECUTION

Meetings + team follow-through

V

VISIBILITY OVER ABILITY

Search + distribution

E

ENGAGE AUTHENTICALLY

Clients + personal responses

REMEMBER P.R.O.V.E. is a workflow—not a tool list.

EXECUTE Choose the pillar that removes the most friction first.

P / PREPARE SMARTER

P PREPARE SMARTER
R REPURPOSE YOUR VOICE
O ORGANIZE EXECUTION
V VISIBILITY OVER ABILITY
E ENGAGE AUTHENTICALLY

TURN MARKET NOISE INTO INSIGHT

RESEARCH ONCE. USE IT FIVE WAYS.

01
WHAT HAPPENED?
Jobs • PCE • Fed • Bonds

02
WHY IT MATTERS
Mortgage + client impact

03
CLIENT MESSAGE
60-second market video

04
TEAM TALK TRACK
Usable LO update

05
PARTNER ANGLE
Relevant Realtor conversation

RESEARCH EXAMPLES

- Jobs report
- PCE / CPI
- Fed language
- 10Y + MBS
- Local housing data

EXECUTE EXAMPLES

- 60-sec video
- LO morning script
- Client text
- Realtor talking point
- Blog / FAQ

ONE CONVERSATION. MANY OUTPUTS.

YOUR VOICE MULTIPLIES.

VIDEO SCRIPT

SOCIAL CAPTION

YOUTUBE

BLOG + EMAIL

FAQ + CLIPS

PARTNER TALK TRACK

INPUT EXAMPLES

- Client call
- Podcast clip
- Sales huddle
- Market video
- Partner meeting

EXECUTE EXAMPLES

- Caption
- Email
- Blog
- YouTube SEO
- Short clips

DON’T LET CONVERSATIONS DIE

EVERY MEETING NEEDS A NEXT STEP.

01
RECAP
What mattered

02
OWNERS
Who does what

03
DATES
By when

04
FOLLOW-UP
In your tone

05
NEXT AGENDA
Keep momentum

MEETING INPUTS

Sales huddle | 1:1 coaching | Partner call | Client consult | Team meeting

EXECUTE EXAMPLES

Recap | Owner + due date | Follow-up email | Handoff | Next agenda

REMOVE THE ADMIN DRAG

MORE EXECUTION AROUND YOUR PEOPLE.

01
HUDDLE RECAP
Decisions + priorities

02
LO FOLLOW-UP
Individual coaching

03
HANDOFFS
Processor ↔ LO

04
SOPS
Training + accountability

05
PARTNERS
Events + recruiting

ADMIN INPUTS

Notes | Emails | Fireflies | Pipeline items | Event ideas

EXECUTE EXAMPLES

Assign owner | Draft SOP | Create checklist | Send follow-up | Set accountability

P PREPARE SMARTER
R REPURPOSE YOUR VOICE
O ORGANIZE EXECUTION
V VISIBILITY OVER ABILITY
E ENGAGE AUTHENTICALLY

SHOW UP WITH USEFUL EDUCATION

BE SEARCHABLE. BE USEFUL. BE CONSISTENT.

01
RATES + FED
Market education

02
FHA + BUYDOWNS
Buyer strategy

03
HELOCS
Equity solutions

04
DIVORCE LENDING
Specialized education

05
LOCAL SEARCH
Own your market

RESEARCH EXAMPLES

Rates | Fed | FHA | Buydowns | Local housing

EXECUTE EXAMPLES

Website blog | Google profile | LinkedIn | Facebook | Email

FROM COMPLEX TO CLEAR

AI HELPS EXPLAIN. YOU OWN THE ADVICE.

AUS FINDINGS

Translate complexity

GUIDELINES

Verify before sending

2/1 BUYDOWN

Show the strategy

HELOC OPTIONS

Compare clearly

APPRAISALS

Explain the issue

DOCS

Make the next step obvious

CLIENT EXAMPLES

- AUS findings
- FHA rules
- HELOC
- Appraisal
- Credit

EXECUTE EXAMPLES

- Plain-English reply
- Options table
- Doc list
- Next-step text
- Partner explanation

P	R	O	V	E
PREPARE	REPURPOSE	ORGANIZE	VISIBILITY	ENGAGE

THE WORKFLOW IS SIMPLE

INPUT → AI → HUMAN REVIEW → EXECUTION

START WITH WHAT YOU ALREADY DO

- → MEETING
- → CLIENT QUESTION
- → MARKET UPDATE
- → VIDEO
- → PARTNER CONVERSATION

TURN IT INTO WHAT YOU NEED

- → FOLLOW-UP
- → CONTENT
- → CLIENT EDUCATION
- → TEAM ACTION
- → PARTNER OUTREACH

AI DOESN’T CREATE THE RELATIONSHIP. IT CREATES MORE TIME FOR IT.

YOUR NEXT MOVE

P PREPARE
R REPURPOSE
O ORGANIZE
V VISIBILITY
E ENGAGE

ONE TAKEAWAY.
ONE ACTION.

TAKEAWAY

DON’T ADD MORE AI.

CONNECT AI TO WORK YOU ALREADY DO.

ACTION

PICK ONE WORKFLOW.
BUILD IT THIS WEEK.
RUN IT FOR 30 DAYS.

STOP COLLECTING TOOLS. START EXECUTING.

SCAN FOR THE MOMENTUM RESOURCES

gotmortgagesnj.com/momentum