Leigh Brown
FROM CHAOS TO CLARITY

THE LENDER'S QUICK-START GUIDE

Win the agent. Skip the gimmicks.

Seven Rules That Win Agents

1. **Look them up first.** Spend five minutes on their social media before any meeting. Walk in knowing who they are.
2. **Don't assume the pastries.** Not everyone wants donuts on their desk. Match the gesture to the person, or skip it.
3. **Talk before you pitch.** Lead the first meeting with questions, not a rate sheet.
4. **Never text a cold apply link.** No application link until you've had a real conversation. A cold link reads as lead, not partner.
5. **Know your lane.** Name your specialty and teach from it. Education makes you hard to replace.
6. **Show up, don't just sponsor.** Get in the room at their events. A logo on a banner is not a relationship.
7. **Build the coalition.** Connect them to trusted title, insurance, and inspection. Make the whole deal smoother.

Not That. Do This.

What loses the agent	What wins the agent
"Here's my rate sheet."	**"Tell me about your business."**
Drop-by donuts for everyone	**A gesture that fits what they care about**
Apply link by text	**A real conversation first**
Showing up only when you need a deal	**Showing up at their events**
The same pitch for every agent	**A pitch built around their agent type**

© 2026 Leigh Thomas Brown, Inc. | LeighBrown.com | All Rights Reserved.

Size Up The Agent In Five Minutes.

Find the type. Lead with what they value.

Agent type	What they want	Your move
New agent	To not look lost in front of clients	**Teach them. Make them sound smart.**
Solo veteran	Reliability and no surprises	**Be consistent. Protect their reputation.**
Team leader	Speed and on-time closings	**Tighten communication. Close clean.**
Luxury or listing pro	Polish and a great client experience	**Be smooth with high-net-worth buyers.**
Buyer-focused agent	Clean pre-approvals, fast answers	**Solve tricky files quickly.**
Social-media agent	Content and visibility	**Make video. Show up on camera.**

Before You Walk In.

- ☐ **I looked them up and know what they post about.**
- ☐ **I know what kind of agent they are and what they value.**
- ☐ **I have one genuine point of connection to open with.**
- ☐ **I'm bringing questions, not a rate sheet.**
- ☐ **No apply link goes out until we've talked.**

First Meeting, Ask These Three.

Tell me about your business. Who do you love working with?

What's frustrated you about lenders before?

What would make me genuinely useful to you, beyond a rate?

Once You've Earned The Relationship, Keep Earning It.

Check in even when there isn't an active transaction.

Invite them to record a short video, livestream, or market update together for their audience.

Ask, "How can I help you grow your business this quarter?" Then follow through.

Introduce them to trusted professionals who make their business stronger.

Keep bringing ideas, education, and opportunities instead of only asking for referrals.

BOTTOM LINE:

If you're only visible during a transaction, someone else has room to become their favorite lender.

© 2026 Leigh Thomas Brown, Inc. | LeighBrown.com | All Rights Reserved.