FUNDING AGENT TOOLS CHECKLIST

🧰 BASIC PROSPECTING TOOLS

- A stack of postcards / flyers
- Business networking cards
- A notebook or small clipboard
- A pen (always)
- A simple daily prospect list (names + notes)
- A comfortable opener script (memorized 1–2 lines)

📝 DIY CONSULTATION TOOLS

- Printed Question Sheet
- Extra copies of the sheet for in-person visits
- A folder to keep sheets organized
- A simple 3-step explanation card ("Apply → Review → Fund")

🔗 GUIDANCE & HAND-OFF TOOLS

- Your personalized Bank Breezy referral link
- Saved text message templates on your phone
- A note app with your "Guidance Script"
- A saved message that explains the next steps
- Keep everything you need in a suitcase

📊 CRM & ORGANIZATION TOOLS

- HubSpot CRM (free)
- HubSpot mobile app installed
- Contacts segmented (Hot / Warm / Cold)
- Pipeline stages labeled
- Daily follow-up reminders turned on
- A weekly "Pipeline Review" routine (20 minutes)

📞 COMMUNICATION TOOLS

- · Phone (calls + texts)
- · Saved text templates:
  - "Did you get my link?"
  - "Did you begin the application?"
  - "Any questions?"
- · Simple email templates
- · Voicemail script ("Just checking in…")

📅 FOLLOW-UP TOOLS

- · Calendar reminders (daily + weekly)
- · HubSpot follow-up tasks
- · 3 follow-up templates (text/email)
- · A "Warm Prospect List" (paper or digital)
- · A "Lost but still valuable" follow-up list

🧠 MINDSET & IDENTITY TOOLS

- · A confident one-line identity statement
- · A mini "Objection Cheat Sheet"
- · A simple affirmation: **"I guide, they decide — the experts do the rest."**
- · A target: "3–5 conversations per day"

📍 LOCAL PROSPECTING TOOLS

- · A route of local businesses
- · A map or Google list
- · A drop-by script
- · A leave-behind flyer ("funding options available")
- · A "Lost but still valuable" follow-up list

🎯THE MINIMUM STARTER KIT

The Big Seven DIY Tools

1. Printed Question Sheet
2. Notebook + Pen
3. HubSpot CRM (free)
4. Phone with saved follow-up texts
5. Bank Breezy referral link
6. Postcards / flyers
7. A simple prospect list (names + notes)

Everything else is optional but helpful.